Technical Evaluation Request

Learning Objectives

After completing this unit, you'll be able to:

- Create a Meeting Agenda Item for Allocation
- Identify the fields that need to be filled in the Meeting Agenda Item

Introduction

To request an evaluation from Product Development for a specific Opportunity, a Meeting Agenda Item needs to be created for Allocation and specific fields need to be filled.

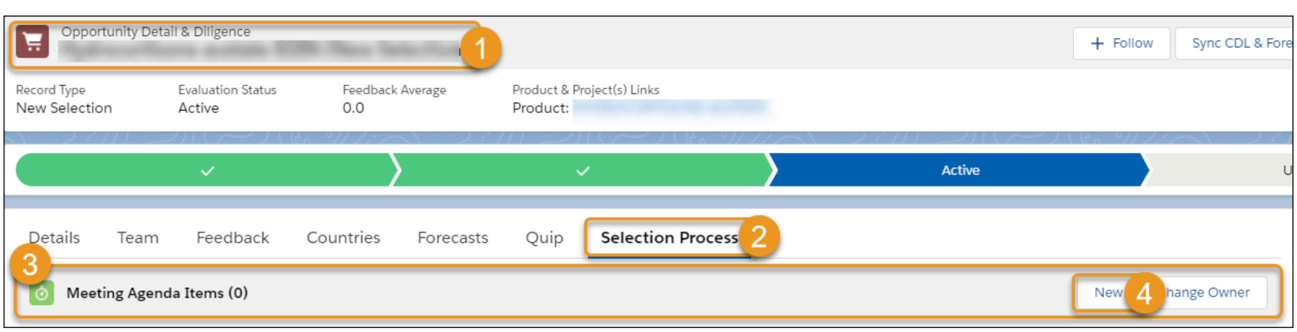
In this unit, we'll follow the process and detail the steps needed to get things started.

Create a Meeting Agenda Item for Allocation (Portfolio Manager)

Once the Opportunity D&D record is created, you need to get feedback from the development function by creating an Allocation Meeting Agenda Item and specifying the planned month.

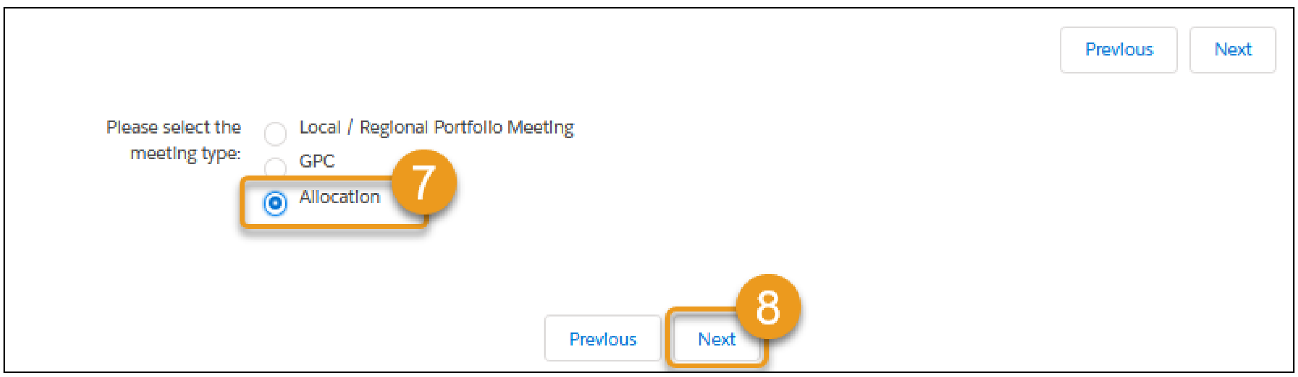
Here is how you can create a Meeting Agenda Item for Allocation:

1. On the **"Opportunity Detail and Diligence**" record
2. Click on the "**Selection Process**" tab
3. Find the "**Meeting Agenda Items**" section
4. Click "**New**"



5. Select **"Meeting Agenda Item**"
6. Click **"Next"**

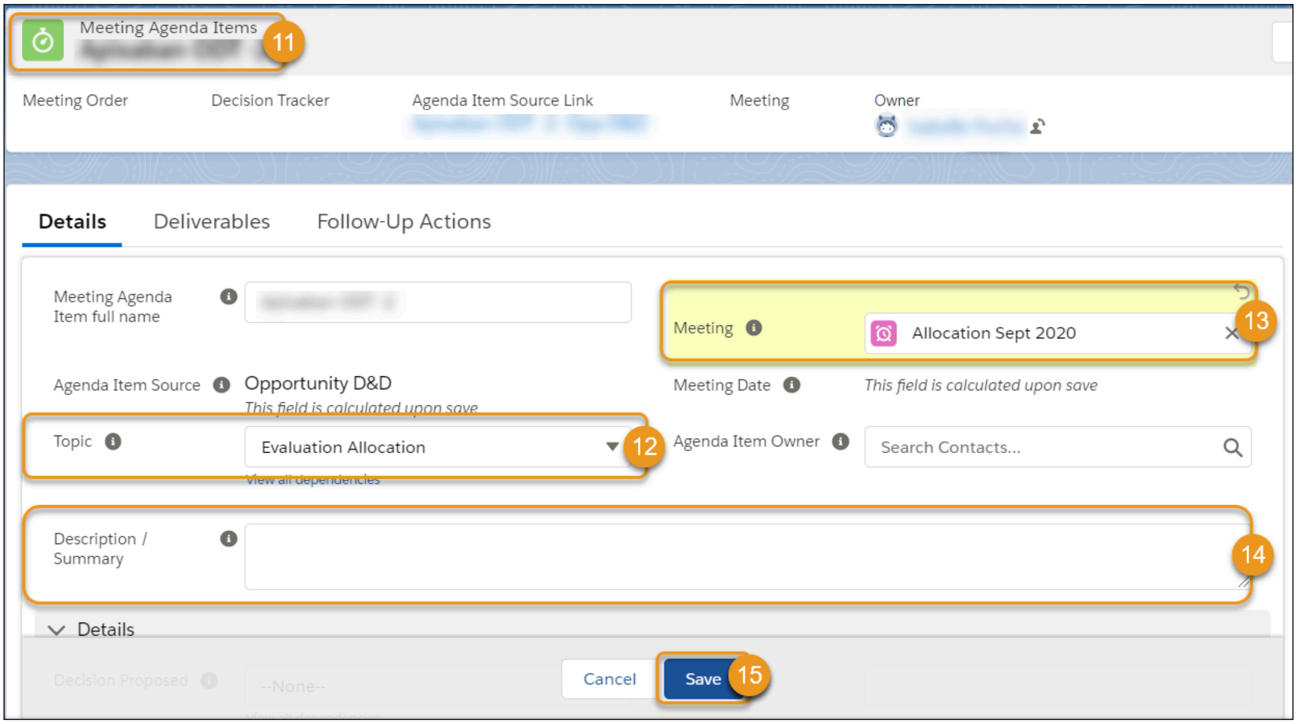
7. Select **"Allocation"** as the meeting type
8. Click **"Next"**



9. A success message is shown
10. You can click on **"Finish"**

11. You will be redirected to the newly created record
12. You can see that the **"Topic"** field has been auto-populated as **"Evaluation Allocation"**
13. On the "**Meeting**" field, click on the pencil icon and select "**Allocation"** for the month and year you desire the evaluation to start, considering the standard evaluation time of at least 4 weeks until your defined evaluation due date on the Opp D&D

14. Add a description to the field **"Description/Summary"** with some background of the Product or specific aspects to be considered in the evaluation
15. Click **"Save"** to save the change



Carefully check on the Opp D&D that the correct strength(s), countries in scope, and the 'Evaluation Due Date' are entered.

Now everything is ready for the SGD PMO to get the relevant project managers to be nominated in the Allocation Meeting.