

# Preparing for the GPC Meeting

## Learning Objectives

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

- Understand the importance of preparing the Opp D&D record
- Create and manage a Meeting Agenda Item record for the GPC Meeting

## Introduction

Are you ready to bring your new product selection proposal or scope extension Opportunity for an existing Project to GPC for a decision? Here is how to start! As a Portfolio Manager, you will need to create the Meeting Agenda Item (MAI) for the selection in GPC, starting from the Opportunity D&D (Opp D&D) record.



There are also other sources to create a Meeting Agenda Item (from Portfolio Project, Country Detail Level, BD deal, Project & Launch Management).

However, for selection decisions, scope extensions, back up selections and switch selections you must always start from the Opp D&D record.

Continue reading to learn how to bring your Product to a GPC Meeting!

## Prepare to create a Meeting Agenda Item

Before jumping into the creation of the Meeting Agenda Item record, there is some preparation work to be done. In the Opp D&D record, some data needs to be populated in order for the creation of the MAI to run smoothly. Let's take a look at this important data.

1. In the “**Details**” tab, make sure that “**Proposal Lead**” (a), “**Product Class**” (b), and “**Type of Opportunity**” (c) are correctly populated. If any of your selections relates to a launched product/ product on the market, you should include LCM as Proposal Lead in field “a”
2. In the “**Countries**” tab, make sure that you have all the Countries to bring to selection and add new ones if missing
3. In the “**Forecasts**” tab, make sure that you have the necessary selection forecasts and create new ones if missing



To learn more about how to create an Opp D&D record and add Countries and Forecasts to the Opp D&D, please check the myTrailhead modules "[How to Create and Manage an Opportunity D&D by Portfolio](#)" (<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0040nm>)" and "[How to Create a Forecast for Selections by Portfolio](#)" (<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0067nm>).

Opportunity Detail & Diligence  
Gentamicin

+ Follow Manage Countries Manage Opportunity

1 Details Team Feedback Countries 2 Forecasts 3 Quip Selection Process

▼ Details

Proposal Lead	Global	a
Product Class	Gx	b
Urgency	N/A	
Likelihood of Selection	N/A	
Evaluation Lead		
Evaluation Status	Selected	
Type of Opportunity	New Selection	c
Triage start date	30/05/2023	
Evaluation Due Date		
Decision date	19/06/2023	

## Creation of a Meeting Agenda Item

After making sure that the preparation work is done, it's time to create the Meeting Agenda Item. Let's see how!

1. On the 'Opportunity Detail and Diligence' record, click on the "**Selection Process**" tab
2. Find the "**Meeting Agenda Items**" related list
3. Click "**New**"

Opportunity Detail & Diligence  
Gentamicin

Record Type: New Selection   Evaluation Status: Active   Feedback Average: 0.0   Product & Project(s) Links: Product: Gentamicin   Originator Product: Gentamicin

Declined → On-hold → **Active** → Under e

Details Team Feedback Countries Forecasts Quip **Selection Process**

**Meeting Agenda Items (1)** 2

1 item • Updated a few seconds ago

Item Name Link Meeting Meeting D... Topic Decision Tr... Description

1  Gentamicin

[View All](#)

4. Select “Meeting Agenda Item”

5. Click “Next”

**New Meeting Agenda Item**

\* Please select the type of item to create

Latest News 4

Meeting Agenda Item

**Next** 5

6. Select “GPC” as the Meeting Type

7. Click “Next”

**New Meeting Agenda Item**

Please select the meeting type:

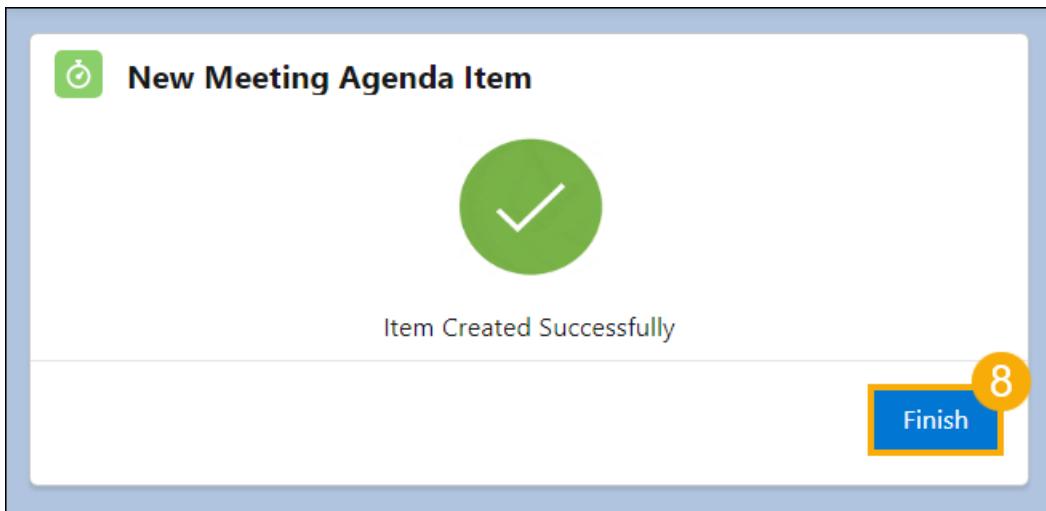
Local / Regional Portfolio Meeting 6

GPC

Allocation

**Previous** **Next** 7

8. Click “Finish” on the success message to finalize the process



The freshly created Meeting Agenda Item record will open up in a new tab.

Meeting Agenda Items		Gentamicin																	
<a href="#">+ Follow</a>	<a href="#">Edit</a>	<a href="#">Update from Source</a>	<a href="#">Change Owner</a>																
<a href="#">Clone</a>	<a href="#">Delete</a>																		
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<b>Files</b> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <a href="#">Upload Files</a>            Or drop files         </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <a href="#">View Report</a> As of Today at 15:36         </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <b>Files for Parent Opportunity Detail &amp; Dil...</b> (0)         </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <b>Activity History</b> (0)         </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <b>Chatter</b> <table border="1"> <tr> <td>Post</td> <td>Poll</td> </tr> <tr> <td colspan="2"><a href="#">Share an update...</a></td> </tr> <tr> <td colspan="2"><a href="#">Share</a></td> </tr> </table> </div>				Post	Poll	<a href="#">Share an update...</a>		<a href="#">Share</a>											
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## What to complete in the Meeting Agenda Item?

Before starting to complete the necessary information in the Meeting Agenda Item, there is a way to save time and automatically populate some fields. To do that, simply use the "**Update from Source**" button to retrieve the information you carefully prepared before the MAI creation. This button automatically populates on the MAI the countries you included in your selection and the selection forecast you uploaded in the Opp D&D.

The screenshot shows a software interface for managing meeting agenda items. At the top, there's a header bar with a green icon, the text 'Meeting Agenda Items', and a search field containing 'Gentamicin'. To the right of the search field are buttons for '+ Follow', 'Edit', 'Update from Source' (which is highlighted in yellow), 'Change Owner', 'Clone', and 'Delete'. Below the header, there's a row of links: 'Meeting Order', 'Decision Tracker', 'Agenda Item Source Link' (with 'Gentamicin' in blue), 'Meeting' (with a blue background), and 'Owner' (with a blue background). The main content area is mostly blank, indicating the record details are being loaded.

But even though some of the fields in the MAI record can be automatically populated, as a Portfolio Manager you still need to maintain the rest of them. To edit this record, go to the 'Details' tab and click on the pencil icon next to any field, or click the 'Edit' button on the header. Now let's take a look at what fields need action.

1. **Meeting** - search and select the GPC meeting you would like this item to be reviewed in (if you type GPC the meeting suggestions will pop up)
2. **Topic** - to further clarify the nature of the topic. Simply select one of the options from the dropdown list
3. **Agenda Item Owner** - search and select your name
4. **Description / Summary** - use this field to give details on the topic, decision or rationale
5. **Decision Proposed** - enter the decision you are proposing during the GPC meeting. Notice that the options on this dropdown are dependent on the Topic field, which means that they change for each Topic
6. **Net Sales, Cost, and NPV** - these fields are automatically populated by the function 'Update from Source' from corresponding fields in the Opp D&D
7. **Strengths** - this field is automatically populated from the Opp D&D. You should check if these values are the correct ones to bring for selection

Meeting Agenda Items  
**Gentamicin**

**Details** Deliverables Follow-Up Actions

Meeting Agenda Item full name: **Gentamicin** Meeting Search Meetings... 1

Agenda Item Source: **Opportunity D&D** This field is calculated upon save 2

Topic: **--None--** 3

Meeting Date: **This field is calculated upon save** 4

Agenda Item Owner: Search Contacts... 5

Description / Summary: 6

Decision Proposed: **--None--** 7

Decision Final: **--None--** 8

Countries: **Namer (North America)(2) : CA,US ; Other(1) : IE** 9

Strengths: **(5 mg) / 10 ml** 10

Meeting Minutes: 11

**Country Planning**

Selected BD / Co-Dev: 12

13 14

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