User Solution Request Template

This template is used to capture a business user's solution idea in a structured way. It ensures all necessary details about the idea, people involved, tools used, and value measures are gathered. Each section below should be filled out briefly and clearly by the idea submitter.

Idea

What to include: *A brief summary of the idea and the pain points in the current process that it aims to address.* Describe **what problem** you're trying to solve and **how your idea solves it**, highlighting any inefficiencies or challenges in the status quo. For example, you might explain that a task is currently time-consuming or error-prone and how a new app or automation would improve it. Keep this description concise—just a few sentences focusing on the **pain point(s)** and the **proposed solution** you do not have to focus on what technology to use.

> **Idea Description (example):** *"Currently, our team spends hours manually consolidating data from multiple Excel files each week, which leads to delays and occasional errors. The proposed solution is tool that automates data aggregation, reducing manual effort and improving accuracy."*

Affected People

What to include: *Who is involved in or impacted by this process?* List the **personas, roles, or groups** that participate in the current process or would benefit from the solution. Be sure to include all key stakeholders – **end users, approvers, managers**, and any **external parties** like customers or vendors, if they are part of the process. Indicate the size or number of people (if known) for context. This helps us understand **who** the solution is for and ensures no stakeholder is overlooked.

> **Affected People (example):** *"Sales team members who prepare the weekly reports (around 5 people), their manager who reviews/approves the report, and external partners who provide input data. (Also involves an external vendor who sends data via email.)"*

User Story

What to include: *A short statement from the user's perspective describing what they need and why.* This is typically written in the format **"As a** [role or persona]**, I want to** [do something]**, so that** [benefit]**."** This format clearly identifies the **who** (user role), **what** (goal or requirement), and **why** (value or outcome). The user story captures the **user's need** without specifying how to implement it. If the solution will serve different user groups or cover multiple functions, include a **user story for each** to ensure all perspectives are considered.

> **User Story (example):** *"As a **Sales Admin**, I want to obtain **weekly dashboard reports**, so that I can **take corrective actions at the end of each week**."*

*(This example identifies the persona **Sales Admin**, the need **to get weekly reports**, and the benefit **of being able to fix issues at the end of each week**. Use a similar format for each major user role or feature in your scenario.)*

Existing Tools

What to include: *List the tools and methods currently used in the process.* Identify all **software applications** (e.g. Excel, Outlook, SharePoint) and **non-software tools or manual steps** (e.g. hand calculations, whiteboard, meetings) that are part of the current workflow. This gives insight into the environment and constraints of the current process. If certain tools are missing or if people resort to improvised solutions (like manual workarounds), note those as well. You can also mention if there's an **existing system** that the new solution would replace or integrate with.

> **Tools (example):** *"Currently using Excel spreadsheets to track data and Outlook for sending updates. Calculations are often done manually in a notebook. There is no centralized system – each team member maintains a separate Excel file, and we combine them in meetings."*

Measure ROI

What to include: *How will we measure the success and value of this idea?* List key **metrics or indicators** that demonstrate the potential Return on Investment. For each measure, provide the **current baseline** (how it is today) and the **expected improvement** if the idea is implemented. Common measures include time savings, cost savings, error reduction, productivity gain, improved customer satisfaction, etc. Be as specific as possible – for example, quantify time spent on a task currently and how much time could be saved. You can list multiple measures if the idea has several benefits (the Innovation Backlog app allows adding multiple measures for different pain points).

> **Measure ROI (example):** *"**Time spent** on data consolidation: currently ~10 hours/week across the team of 5, expected to drop to ~2 hours with the new app (saving ~8 hours/week). **Error rate** in reports: currently ~2 errors per week, expected to approach 0 with automation (improving accuracy)."*

For instance, if your idea will save significant time or money, you might quantify it as follows:

(Replace the example values above with those relevant to your idea. Providing concrete numbers helps stakeholders understand the potential impact.)

Time Saved (per Week)	Cost Savings (per Year)
8 hours	**$10K**
Estimated reduction in manual work	Approx. operational savings from efficiency

Workflow

What to include: *A brief description of the current process workflow (and optionally how it will change).* Outline the **steps of the existing process** to illustrate how things are done today. This can be a simple bullet list of steps or a short paragraph. If available, you might refer to or attach a process diagram (such as a flowchart) for clarity – though a written summary is fine. Focus on the key stages where the idea will make a difference. Additionally, you can describe the **proposed workflow** after implementing the idea, highlighting what will be different (this gives developers or reviewers insight into the future state). Keep this section high-level and understandable by someone unfamiliar with the process.

> **Workflow (example - Current vs Proposed):** *"**Current:** Data is collected from five separate spreadsheets via email, then manually merged into one report. This involves three main steps: (1) each sales rep emails their Excel file, (2) the coordinator copy-pastes data into a master file, (3) a meeting is held to verify numbers and finalize the report. **Proposed:** A centralized tool where all sales reps input data, eliminating emails and manual merging. The app would compile the report automatically, and notifications would replace the weekly verification meeting."*

Current Workflow:

Proposed Workflow:

How to Use This Template: Once all sections are filled out, the idea submission can be reviewed for inclusion in the innovation backlog. Ensure the information is complete but succinct. This document will help stakeholders quickly grasp the problem and proposed solution along with its expected benefits, facilitating evaluation and prioritization of the idea. Remember, the goal is to communicate the **what**, **who**, **how**, and **why** of the idea in a way that's easy for others to understand and act upon.