Idea and proposal management Quick Flow Demo Card

SMA-X 2017.11

# Background

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| Key Messages | * Ideation is a new function which allows users to suggest ideas which can be categorized, reviewed and finally approved by business owners or review board members, and then become official change requests or proposals. * Proposal management provides an easy way for the PMO to filter all proposals and decide which ones should become projects which can be handled by a Project Manager. |
| Customer Challenge | * IT department is struggling with the manual process of collecting innovation ideas from different business units. * Business users constantly complain that it is very hard to let the IT department know their thoughts and their ideas are always lost in the process. * Members of the Idea review board normally hold a weekly meeting to decide which innovation ideas should be moved to the next stage, and it is hard to notify all submitters about the progress of their ideas. * PMO needs constant collaboration with team members in order to track and analyze all demands on time, and then make decision in a timely manner. |
| Engage Them | * Do you have an easy to use system to collect innovation ideas from all business units and IT departments? * Do you want to avoid weekly innovation ideas review meeting? * Are you struggling with proposal analysis? |
| Differentiators | * Easily capture innovation ideas from the business. * Improve efficiency of the idea review process. * Easily evaluate proposals for project or change feasibility and value. |

# Quick Flow

Quick flow is to provide a benefit oriented overview, to introduce customer to value and should be completed in ~5-10 minutes. Optional sub-flows are below. Make sure your environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide to the demo.

| **Do** | **Say** | **Cheat Sheet** |
| --- | --- | --- |
| **Idea and Proposal Management process** | * You no longer need to struggle with a manual process of collecting innovation ideas from different business units.   + Business users can just fill in necessary information on one page to complete idea submission and always monitor the status of all their ideas.   + Users can vote for ideas that they agree with.   + Idea managers can categorize ideas.   + Idea approvers can approve ideas to become a proposal or change request | * Discuss the value of collecting innovative ideas from the business and managing the idea and proposal process workflow. |
| **Submit Idea**   * Logon to ESS as a business user (amy.lopezmf ), click the suggest idea. Enter idea title and description, and publish the idea.   **Monitor Idea status**   * Click the top right image, and then click ideas link to see the status of the idea(s) you submitted.   **Vote for Ideas**   * Click Suggest Idea * Enter “application” and wait * Once you stop typing, similar ideas will show up. * Select one and Like it | * Business users can just fill in necessary information on one page to complete idea submission and always monitor the status of all their ideas. * When suggesting an idea, you can also find similar ideas from other users. It will reduce the likelihood that you log a duplicate idea, and also give you a chance to like an existing idea. | * Suggest idea * Check idea status * Suggest “application” and see one of the suggested ideas and Like it |
| **Categorize Idea**   * Logon as an idea manager (jennifer.falconmf) Main menu > Idea & Proposal * Filter the list to find Ideas where Idea type is null. * Using the Preview window, set the Idea type for the new idea that Amy created above to a value of your choice applicable to the idea itself and forward to the Review phase. | * Idea managers can categorize ideas by using preview window on the right, without leaving ideas list page, or going into idea detail page to choose idea type. | * Categorize Idea * Advance to Review phase. |
| **Decide on next step (Review Decision)**   * As Jennifer, in the Idea & Proposal list, Select the view: “Ideas pending Review Decision”. * Select the idea that Amy submitted above and in the preview window on the right, press Edit. * Choose the review decision of “create a proposal”, fill in review feedback to “Under Review”, then Save. | * Easily decide on the outcome of the idea | * “Ideas pending Review Decision” view * Set Review Decision on Amy’s idea to “Create a proposal” * Set Review feedback to “Under Review” * Save |
| **Create Proposal or Change from Idea**   * Select the link to the idea. Push “create proposal” button on the top menu. * Set Business Objective to “Service Improvement”, Save | * Ideas that have been approved can quickly be moved forward as a project or change request. | * In idea, press “Create proposal” button on menu bar * Set Business Objective * Save |
| ***Optional sub-flow:***  ***Proposal Refinement***  Enter the Business Value, Start/End date, cost on the Financial Planning tab, risk value | * Fill-in the Business Value, Start/End date, costs on the financial planning tab, risk value so that proposals can be compared and evaluated against other proposals as discussed in the next step. | * Business Value * Start/End Date * Cost * Risk |
| **Analyze Proposals**   * Logon as Portfolio Manager (still as Jennifer or you can use kimberly.quan) * On the Dashboard chart: “Proposal by month”, click this month. You will see all proposals submitted this month. * You can click “Proposal Analytics” tab on the top to see all proposals’ business value/risk/cost, and then pick valuable proposals which can be moved to next stage. * You can select a few bubbles and see the cost and business value chart on the right will update | * Proposal management provides an easy way for the PMO to filter all proposals and decide which ones should become a project. | * Dashboard: Proposal by Month chart * Drill-down * Proposal Analytics * Select a few bubbles and see right side bar change |

# Optional Sub Flows

Customer intrigued after seeing this overview? Ideas for possible sub-flows/drill-downs:

| **Do** | **Say** |
| --- | --- |
| Idea submission   * Logon to ESS as IT user. Click the top right image, and then click Ideas link. All ideas submitted by you will be displayed. You can also find all “Hot idea” and “idea you may like”. * Define an idea approval definition for a group that Jennifer is a member of. | * By checking “Hot idea” and “Idea you may like” recommended by the system, it is very easy for you to check company-wide ideas that may be related to your job. * As Jennifer, open the Self-service portal in a new tab. Click the top right image, and then you will find all pending approval ideas. You can approve idea by directly click approve/reject icon, or going into idea detail page to approve/reject it. |

More detailed flows will be required for POC type efforts (not provided).

# Demo Preparation

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Pre-demo Checklist (in addition to above)

* Create a public view for Ideas where Phase ID is “Review” and name it “Ideas pending Review Decision”.
* Configure user profile for amy.lopezmf. Set “android” for Devices field, “application” for Software field.
* As Amy, create 2 ideas, save one as draft and publish the other one.
* Create new report for payroll to show number of employees per manager and department, Payroll service
* Require all users to upload their photo so we can get to know each other, Payroll service