

Jira Intake - Projects (Not Continuous Improvement Process)

****Note - this was copied from BusSys and may need editing to fit BI process (TBD)**

Intake:

1. Business has an idea and starts putting together the value statements and metrics that will improve. They should be making sure they have budget and they themselves have resources.
2. Business talks to BRM (in this workstream that's Veronika) and Veronika does an intake process where we are looking at value, prioritization within our already full roadmap, criticality etc.
3. Initiative is discussed with you and Janet (and me) to ensure we are all on the same page and a 'gut' t-shirt sizing is discussed (is this massive, medium project, small project, etc)
4. Business case is put together (the 4 box slide that shows problem statement, recommendation, metrics and costs) and BRM/Business/Michelle look at it and say "okay the juice is worth the squeeze here and we think it fits into the prioritization at this point.

Post Intake

1. Discuss within the governance team for the workstream and ensure the business line executives agree to the prioritization
2. Engage security, procurement, legal (this workflow will be instrumented very soon by a new tool called Zip)
3. Go through further steps on discovery for fine tuning of the effort and planning.
4. If >\$50K take to IT Exec Steerco for final approval

image below if from BusSys Miro Board : [Business Systems Intake and Planning\(Continuous Improvement\)](#), Online Whiteboard for Visual Collaboration ([miro.com](#))

