

Ideation Phase

Brainstorm & Idea Prioritization Template

Date	10 February 2026
Team ID	LTVIP2026TMIDS56419
Project Name	Calculating Family Expenses using Service Now
Maximum Marks	4 Marks

Brainstorm & Idea Prioritization Template:


Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

Reference: <https://www.mural.co/templates/brainstorm-and-idea-prioritization>

Step-1: Team Gathering, Collaboration and Select the Problem Statement

Template



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

- 🕒 10 minutes to prepare
- 🕒 1 hour to collaborate
- 👤 2-8 people recommended

Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕒 10 minutes

A

Team gathering
The team gathering phase involves bringing together all stakeholders involved in the development of the Family Expense Calculation System using ServiceNow.

B

Set the goal
The primary goal of this project is to design and implement a centralized expense management system that enables families to record, track, and analyze their daily and overall expenses efficiently.

C

Learn how to use the facilitation tools
In this phase, the team familiarizes itself with the tools and features provided by the ServiceNow platform that support application development and collaboration.


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1

Define your problem statement
Managing family expenses manually or using unstructured methods often leads to inaccurate tracking, lack of transparency, and difficulty in understanding spending patterns. Families struggle to consolidate daily expenses, maintain records, and analyze financial data effectively. There is a need for a centralized, automated system that can simplify expense entry, calculation, and reporting while ensuring accuracy and ease of access.

🕒 5 minutes

PROBLEM
How might we design a centralized and automated expense management system using ServiceNow that allows families to record daily expenses, consolidate them efficiently, and gain clear insights into their financial spending to support better financial decision-making?



Key rules of brainstorming

To run a smooth and productive session

- 🗣️ Stay in topic.
- 💡 Encourage wild ideas.
- ⏸️ Defer judgment.
- 👂 Listen to others.
- 🗣️ Go for volume.
- 👁️ If possible, be visual.

Step-2: Brainstorm, Idea Listing and Grouping

2

Brainstorm
Write down any ideas that come to mind that address your problem statement.

10 minutes

TIP

You can select a sticky note and fit the pencil (switch to sketch) tool to start drawing!

Person 1

- Design structured tables for Family Expenses and Daily Expenses to maintain organized financial records.
- Implement auto-numbering for expense records to ensure uniqueness and easy identification.
- Enable daily expense entry with date-wise tracking for accurate financial logging.
- Establish a one-to-many relationship between family expenses and daily expenses.
- Automate expense aggregation using Business Rules to calculate total family expenses.
- Configure mandatory and read-only fields to maintain data integrity.
- Display related daily expenses using Related Lists for better visibility.
- Generate consolidated expense details for quick financial review.
- Ensure the system is scalable and user-friendly for families of different sizes.

3

Group ideas
Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

TIP

Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.

Step-3: Idea Prioritization

4

Prioritize
Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes

TIP

Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the **H** key on the keyboard.

Importance

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

Core Expense Tracking and Automation

This includes the creation of custom ServiceNow tables for Family Expenses and Daily Expenses, form configuration, auto-numbering, and the implementation of business rules for automatic expense calculation. These components form the foundation of the project and are critical for achieving accurate and real-time expense tracking. Although the implementation requires a solid understanding of ServiceNow scripting and configuration, it is achievable within the project scope and delivers maximum value.

Advanced Financial Analytics and Forecasting

Features such as predictive expense forecasting, automated budget alerts, and trend analysis fall into this category. While these enhancements could provide deeper financial insights, they require advanced scripting, analytics integration, and extended development time. As a result, they are not prioritized for the current project phase and are better suited for future expansion.

Data Preparation and Quality Management

This area focuses on maintaining structured, accurate, and reliable expense data. It includes field validation, mandatory and read-only field configuration, proper table relationships, and date-based expense organization. These tasks are straightforward to implement using ServiceNow's built-in features and are essential for ensuring data consistency and reliability throughout the system.

Consolidated Reporting and Summary Views

This includes generating consolidated expense summaries, viewing related daily expenses through related lists, and presenting clear financial overviews for users. These features significantly improve usability and financial visibility while being relatively easy to implement using ServiceNow forms, relationships, and UI configurations.

Feasibility

Regardless of their importance, which task is more feasible than others? (Cost, time, effort, complexity, etc.)

After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

Share the mural

Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.

Export the mural

Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

Keep moving forward

Strategy blueprint

Define the components of a new idea or strategy.
Open the template →

Customer experience journey map

Understand customer needs, motivations, and obstacles for an experience.
Open the template →

Strengths, weaknesses, opportunities & threats

Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.
Open the template →