

Ideation Phase

Brainstorm & Idea Prioritization


Date	24 June 2025
Team ID	LTVIP2025TMID31109
Project Name	Field Service WorkOrder Optimization

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.

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



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
Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

B Set the goal
Think about the problem you'll be focusing on solving in the brainstorming session.

C Learn how to use the facilitation tools
Use the Facilitation Superpowers to run a happy and productive session.

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1


Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

PROBLEM

How might we [your problem statement]?



Key rules of brainstorming

To run an 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 hit the pencil (switch to sketch) icon to start drawing!

Amar

Yuktesh

Person 3

Person 4

Person 5

Person 6

Person 7

Person 8

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. In the last 10 minutes, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.

🕒 20 minutes

Person 4

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



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

Selected Problem Statement:

Field technicians are assigned to tasks manually, causing delays and inefficiencies. There is no automated system to match technicians based on their skills, availability, and location. This project aims to automate the WorkOrder assignment process using Salesforce to improve response time, reduce errors, and streamline communication.

Step-2: Brainstorm, Idea Listing and Grouping

S.No	Idea	Group/Category
1	Use custom objects for Technician, WorkOrder, and Assignment	Data Modeling
2	Use Apex triggers to assign technicians automatically	Automation
3	Match technician skills and location with WorkOrder details	Assignment Logic
4	Send email notifications to assigned technicians	Communication
5	Use dashboards and reports to monitor assignments and status	Reporting
6	Schedule monthly cleanup of old records using batch Apex	Maintenance & Cleanup

Step-3: Idea Prioritization

Priority Level	Idea	Justification
High	Apex trigger for automatic assignment	Solves the main problem – technician assignment
High	Email notification to technicians	Keeps technicians informed in real-time
Medium	Dashboard for WorkOrder tracking	Helps admin and management monitor task flow
Medium	Lookup relationships between objects	Needed to relate data effectively
Low	Scheduled deletion of old WorkOrders	Improves performance but not urgent initially