

Overview

Job Aid | Ideas

This Job Aid defines the steps to follow for creating and maintaining Ideas in Sensei IQ

While creating and maintaining ideas is optional, as you can always create proposals and/or projects directly in Sensei IQ, we recommend using Portfolio IQ to create ideas to record all potential solutions for a business challenge or simply as a list of potential new projects. Capturing and recording ideas supports a strong organizational memory and ensures that good ideas are not forgotten.

There are two (2) core actions required for creating and maintaining ideas. Both are optional and can be completed as defined by organizational policies.

- 1. Creating and maintaining ideas
- 2. Managing the idea process flow



1. DEFINE THE NEW IDEA

- a. Ensure you are in **Portfolio IQ**, and click **Ideas** in the **Innovations** section.
- b. Click + **New** from the command bar.

E Power Apps	Sens	Sensei IQ for Project								
=		\leftarrow 🖾 Show Chart + New 🗓 Delete \vee 🖒 Refresh 🖾 Email a Link \vee 🔹	Import f							
Home Home Recent	~	All Active Ideas ~								
A Pinned	~	✔ Name ↑ ∨ Type ∨								
Leadership		Add more police call boxes in each station Allow customers to enter account number for direct voice automate Transformative								
a Insights		Automated emails reminding customers of recent orders with a "cli- Incremental								
나네 Programs		Change shipping company Incremental								
Intake		Develop automated attendant/bot to determine nature of call and Rădicăl Develop custom molds for packing materials Transformative								
a们 Insights		Direct all calls to website FAQ area and disconnect call Incremental								
+_A Proposais		Direct integration between our suppliers and our shop floor schedu Radical								
Innovation		Discontinue 800 help line - direct all customers to call their account Radical								
Challenges		Discontinue solo adport nine Incernental Discontinue shipping, customers can do curbside pickup								
💡 Ideas		Double the amount of packing material used Incremental								

- c. Complete the **Idea pane** with as much information as you have now.
- d. The Idea Name field is mandatory.



ea Process tive for less than one mi	<	Ident	e ify (< 1 Min)
Petails			
Idea			
Name	*		
Description			
Department	***		
Department Investment Category	 Run	Grow	Transform
Department Investment Category Estimated Cost	Run	Grow	Transform
Department Investment Category Estimated Cost Risk Score	 Run 	Grow	Transform
Department Investment Category Estimated Cost Risk Score Effort Score	run Pun O	0 0	Transform

- If appropriate, mouse over the Related Challenge field to associate the Idea with a Business Challenge. e.
- Search for and select the appropriate Business Challenge. f.
- Click Save & Close. g.

ew Idea				Albert Connell Owner
Process e for less than one mi	ldentify (< 1 Min)		Review	
tails				
dea		Challenge		
Name *		Related Chall	Look for Related Challenge	۶ 🕞
Description			Challenges	Recent records
			Consumers are demanding more mobile tools 23-Nov-20 10:25 AM	
			Customer retention for 6-12 month customers is slippin 05-Mar-20 2:11 PM	g
			Develop and Refine Process for Lead Engagement 24-Feb-20 8:37 AM	
Department			Mandatory training programs are not engaging and em	ployees are not actively

Managing the Idea process flow

Portfolio/Program Manager Þ

Portfolio IQ - Idea - Process Flow

ADVANCE THE IDEA TO THE NEXT STAGE 1.

- a. Ensure you are in Portfolio IQ, and click Ideas in the Innovations section.
- b. Select the appropriate **Idea** to be updated.



	Power Apps	Sens	Sensei IQ for Project								
≡			←	🛱 Show Chart 🕂 New 🗎 Delete 🗸 🗸	🖔 Refresh	🗟 Email a Link 🗸 🗸	💐 Impo				
ស	Home		4	All Active Ideas ~							
Ŀ	Recent	\sim									
\$	Pinned	~	~	Name ↑ ∨		Туре 🗸					
		В		Add more police call boxes in each station							
Lea	dership			Install screen scraping middleware							
ளி	Insights			Late breaking brainstorm							
88.	Portfolios			Purchase mailing list							
.::	Programs										
				Use a mobile enablement service provide							
Inta	ike			Score and rank leads automatically		Radical					
ഫ്	Insights	sights roposals		Send company logo merchandise on 6 month ann	iversary	Incremental					
Ð	Proposals			Offer 5% reduction after 6 months		Radical					
Inn	Innovation			Develop automated attendant/bot to determine n	r Radical						
ഫ്	Insights			Purchase addresses from industry focused sources	c Transformative						
8	Challenges			Online rewards and leaders boards		Transformative					
Ŷ	Ideas	A		Discontinue 800 help line - direct all customers to	call their accoun	t Radical					

- c. Click the **current stage**.
- d. Update the Stage dropdown pane.
- e. Click the Next Stage/Finished button.
- f. Click Save & Close.

	Power Apps	Sens	ei IQ for Project	Q for Project								
=			< [] F	ଟ Save & Close	+ New	🗓 Delete	🖔 Refresh	Export to PDF	B Process	∨ 🖻 Share	N	
ഹ	Home		Add more polic	ce call boxes in	each sta	ation						
٩	Recent	\sim	Idea					•	1			
×?	Pinned	~	Idea Process Active for 1 hour	<			C	ldentify (1 Hrs)				
Lead	dership		Details				Ī	Active for 1 hour	-	ez ×		
สมั	Insights		Idea					Related Challeng	e		hall	
200 00	Portfolios		Namo	1 Add man					-		Pe	
Lii	Programs		Name	Add more	police call t	boxes in each s	station	✓ Name	* Add	more police	- Ne	
Inta	ke		Description	Wireless so riders feel	olar powere safer.	d call buttons	can be added	✓ Investment Cates	gory Run		_	
สติ	Insights						E	N	ext Stage 💙			
Ð	Proposals										_	