

## IQ Job Aid |

#### Overview

This Job Aid defines the steps to follow for creating and managing proposals in Sensei IQ.

While creating and managing proposals is optional, as you can always create projects directly in Project IQ, we recommend using Portfolio IQ to create and ultimately approve proposals as it helps ensure that organizational resources are focused on the proposals/projects that deliver the most value to the organization.

There are two (2) core actions required for creating and managing proposals, and both are mandatory.

- 1. Creating and maintaining proposals
- 2. Managing the proposal approval process

## Creating and maintaining proposals

Portfolio/Program Manager

Portfolio IQ – New Proposal

#### 1. DEFINE THE NEW PROPOSAL

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



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

New Proposal					Sponsor V
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Details		_			
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Proposed Finish	🖻	Proposal Costs			
Department		Financial Benefits			
Investment Category	Run Grow Transform	6 ROI			
Status	New	Estimated Effort (Hrs)			

e. Similarly, complete the **Busines Case pane** with the information currently available.



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Proposal				Business Case	Timeline		
Proposal Name				Problem Statement			
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f. Click Save to create the Proposal and activate the Timeline pane.

New Propos

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- g. Click + in the Timeline sub-ribbon and then select Note to add a note.
- h. Give the note a **Title and descriptive text** to describe the additional proposal content.
- i. Click the **paper clip** to attach a file to the proposal.

Timeline	G	+ ▽ ፲≣ : ≣ Note
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#### 2. UPDATE AN EXISTING PROPOSAL

- a. Select **Proposals** from the **Site Map** to display the list of Active proposals.
- b. Adjust the view as needed to ensure the proposal you are looking for is displayed.
- c. Select the proposal to be updated.



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### Creating and managing proposals



- d. Update any field on the proposal.
- e. Click + in the Timeline sub-ribbon, then select Note to add a note.
- f. Click **Save and Close** when done.

Proposal Proposal Process Active for 8 months	<	Initia	(8 Mo)		Selection	Sponsor
Details						
Proposal Proposal Name	Convert power infrastructure to underground	đ	Business Case Problem Statement	Mother nature in New England causes many	Timeline	+ 7 1 :
Proposal Description	Convert the entire power infrastructure in Ne England from above ground to underground			power outages.	Enter a note	erel business case and
Proposed Start	31-Mar-20		Business Benefits	Reduced number of power outages, reduced personnel costs to repair power outages, reduced risk due to downed power lines, improved aesthetics, elimination of health issues living near exposed power lines, better use of land currently housing power lines supplies.	Ø ⇒ Note modified by Albert Connell Fotential competitive threat identified Marketing has identified a competitive threat	25-Nov-20 11x17 AM V which may delay all ne 25-Nov-20 11x06 AM V
Proposed Finish	29-Apr-30		Proposal Costs	5,000,000.00	Note modified by Albert Connell Initial kickoff Meeting with all identified stakeholders to bra	ainstorm the number a
Department	п		Financial Benefits	12,500,000.00		25-Nov-20 11:45 AM 🗸
Investment Category	Run Grow Trans	sform	Estimated Effort (Hrs)	2.50	L	

# Managing the proposal approval process

Portfolio/Program Manager

Portfolio IQ - Current Proposal – Process Flow

#### 1. ADVANCE THE PROPOSAL TO THE NEXT STAGE

- a. Select **Proposals** from the **Site Map** to display the list of Active proposals.
- b. Adjust the view as needed to ensure the proposal you are looking for is displayed.
- c. Select the proposal to be updated.



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### Creating and managing proposals



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

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roposal Process ctive for 8 months	<			D	Initiation (8 Mo)		
Details					Active for 8 months		62
Proposal					Business Case completed?	*	□ Incomplete
Proposal Proposal Name Proposal Descrip		Convert power infrastru Convert the entire pow				*	□ Incomplete