

## Overview

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

While creating and maintaining business challenges is optional, as you can always create proposals and/or projects directly in Sensei IQ, we recommend using Portfolio IQ to create Business Challenges as they are the initial entry point into the Sensei IQ project intake funnel, and they help define the scope and help validate that the resultant project results resolve the original business challenge.

There are three (3) core actions required for creating and maintaining business challenges. All are optional and can be completed as defined by organizational policies.

1. Creating and maintaining business challenges
2. Associating ideas with challenges
3. Managing the challenge process flow

# Creating and maintaining Business Challenges

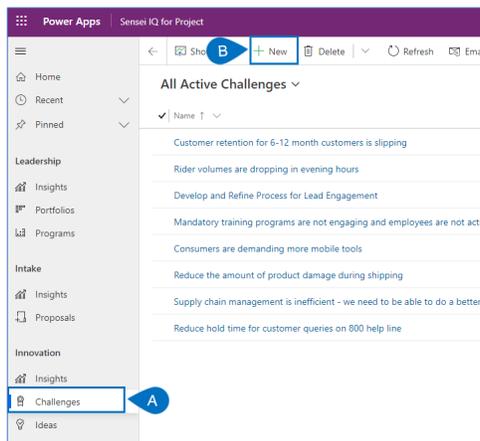
 **Portfolio/Program Manager**



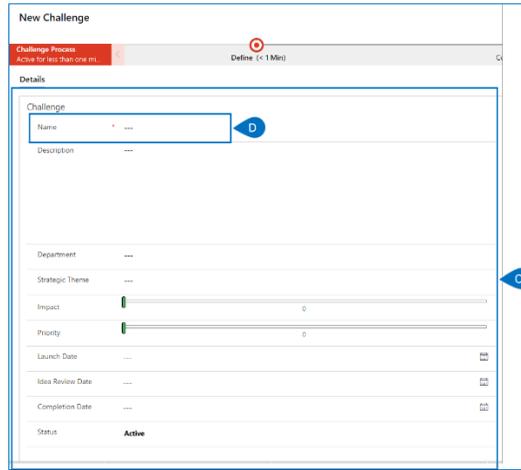
**Portfolio IQ – Challenges**

## 1. DEFINE THE NEW BUSINESS CHALLENGE

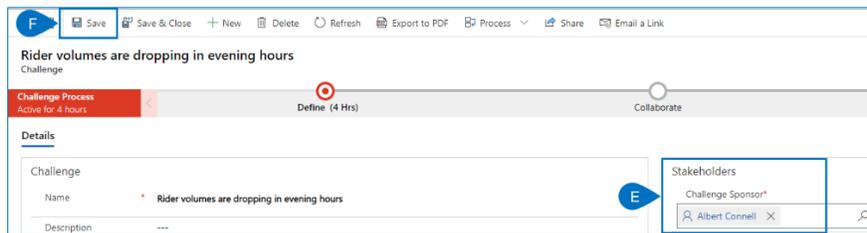
- a. Ensure you are in **Portfolio IQ**, and click **Challenges** in the **Innovations** section.
- b. Click **+ New** from the command bar.



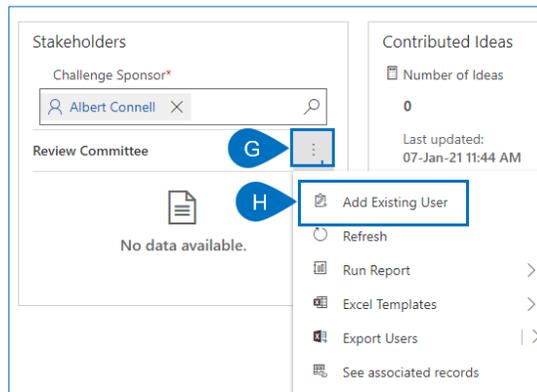
- c. Complete the **Challenge pane** with as much information as you have now.
- d. The Business Challenge **Name field is mandatory**.



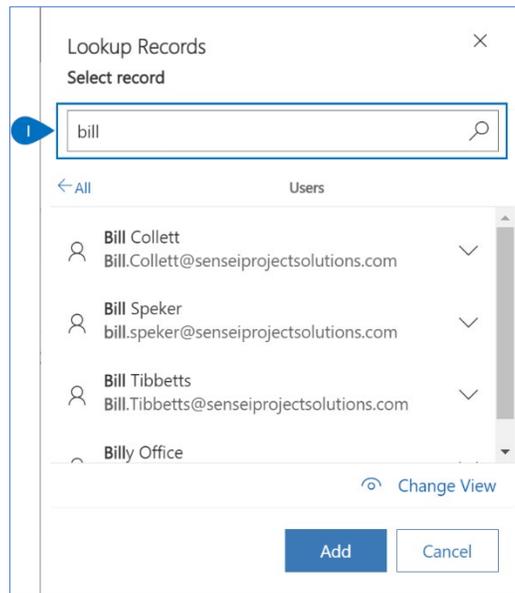
- e. Identify the **Challenge sponsor** in the Stakeholders pane.
- f. Click **Save**.



- g. Click on the **ellipsis** below the Stakeholder header.
- h. Select **Add Existing User**.



- i. Search for and add the **challenge review committee members**.



j. Click **Add** and then **Save and Close**.

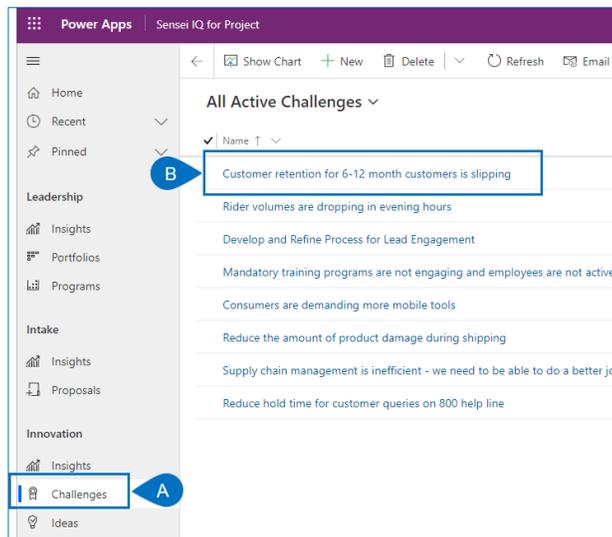
## Associating Ideas with Challenges

**Portfolio/Program Manager**

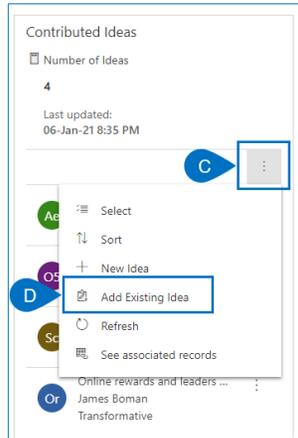
**Portfolio IQ -Challenges**

### 1. ASSOCIATE IDEAS WITH CHALLENGES

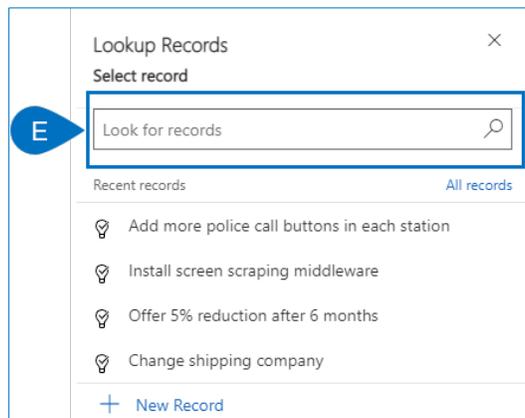
- Ensure you are in **Portfolio IQ**, and click **Challenges** in the **Innovations** section.
- Select the appropriate **Business Challenge** to be updated.



- Click the **ellipsis** under the **Contributed Ideas** pane header.
- Select **Add Existing Idea**.



e. Search for and **add the appropriate Ideas**.



a. Click **Add** and then **Save and Close**.

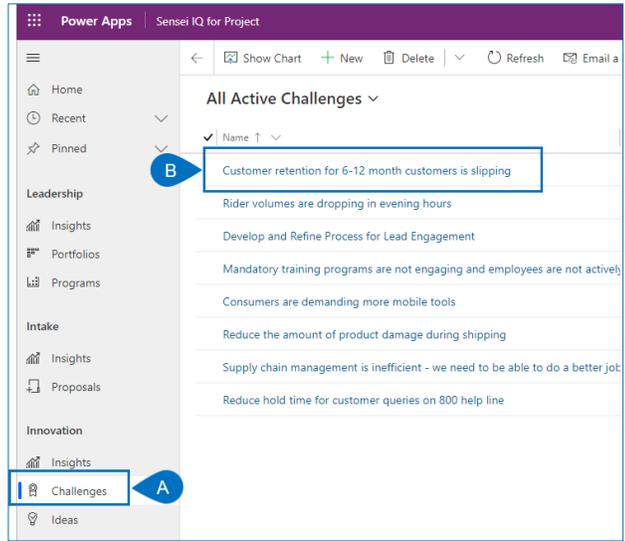
## Managing the Challenge process flow

 **Portfolio/Program Manager**

 **Portfolio IQ -Challenge – Process Flow**

### 1. ADVANCE THE BUSINESS CHALLENGE TO THE NEXT STAGE

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



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

