

# Creating and Managing Proposals

 Portfolio IQ

 Portfolio/Program Manager, Project Manager

**Instructions:** Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of **senseiIQ™** in the classroom. While the examples used herein may be different from (or not available) in your organization's senseiIQ™ instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the **Sensei.IQ for Project** application.

Please note the Job Aid for [Creating and Managing Proposals](#) within Learning IQ compliments the following lab sets, each of which contains two sets of data; Set A and Set B.




**Lab Exercise 1.**      Create a Proposal




# 1. Create a Proposal

## Set A

### Proposal

<b>Name</b>	Implement Station Cleanliness Feedback Terminals in Each Station
<b>Description</b>	In person surveys indicate many riders are dissatisfied with overall cleanliness of the stations. Simple to use feedback terminals at all station exits should allow riders to easily report a need for immediate cleaning, which should increase rider's overall satisfaction with our service.
<b>Proposed Start</b>	Select September of the current year from the date picker 
<b>Proposed Finish</b>	Select September of the following year from the date picker 
<b>Department</b>	Select from the list 
<b>Investment Category</b>	Run
<b>Status</b>	New

### Business Case

<b>Problem Statement</b>	While regular cleaning is performed on all stations four times a day, unique events such as windstorms or simply undisciplined riders can require additional unscheduled cleaning. Our riders are expressing dissatisfaction with the cleanliness of some stations. We need a way to address this dissatisfaction.
<b>Business Benefits</b>	We are experiencing significant rider discomfort with dirty stations and believe it is a contributing factor or decreased rider volumes. Cleaner stations should allow us to maintain our current rider volumes.
<b>Proposal Costs</b>	\$20,000
<b>Financial Benefits</b>	\$850,000
<b>ROI</b>	Locked field  – will automatically calculate once form is saved
<b>Estimated Effort</b>	200

### Timeline Note 1

<b>Title</b>	Cost-Benefit Analysis
<b>Text</b>	See attached cost-benefit analysis conducted during vendor selection
<b>Attachment</b>	Attach any sample document from your local drive




### Timeline Note 2




<b>Title</b>	Cost-Benefit Analysis
<b>Text</b>	See attached vendor proposals during the tender process.
<b>Attachment</b>	Attach any sample document from your local drive

## Set B

### Proposal

<b>Name</b>	Transition Workforce to 100% Remote
<b>Description</b>	Based on current events, we plan to close all three office locations, migrate the technical infrastructure to the cloud, and provide cloud-based productivity tools to the entire workforce of approximately 2500.
<b>Proposed Start</b>	Select December of the current year from the date picker 
<b>Proposed Finish</b>	Select December of the following year from the date picker 
<b>Department</b>	Select from the list 
<b>Investment Category</b>	Transform
<b>Status</b>	New

### Business Case

<b>Problem Statement</b>	Everyone has been directed to work from home.
<b>Business Benefits</b>	Transitioning now to address the immediate situation will set us up to be more mobile in the future and reduce expenses related to maintaining physical locations.
<b>Proposal Costs</b>	\$450,000
<b>Financial Benefits</b>	\$1,500,000
<b>ROI</b>	Locked field  – will automatically calculate once form is saved
<b>Estimated Effort</b>	2000

### Timeline Note 1

<b>Title</b>	Remote working memorandum
<b>Text</b>	See attached memorandum on work from home from Corporate
<b>Attachment</b>	Attach any sample document from your local drive

### Timeline Note 2



<b>Title</b>	Proposed Transition Plan
<b>Text</b>	See attached transition plan being proposed
<b>Attachment</b>	Attach any sample document from your local drive