

Overview

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

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

There are three (3) core actions required for creating and managing proposals. Though defining resource requirements for proposals is optional, we do recommend doing so to ensure the organisation understands the level of effort that will be required to deliver the project if it is approved. The other two actions are mandatory.

1. Creating and maintaining proposals
2. Defining proposal resource requirements
3. Managing the proposal approval process

Creating and maintaining proposals



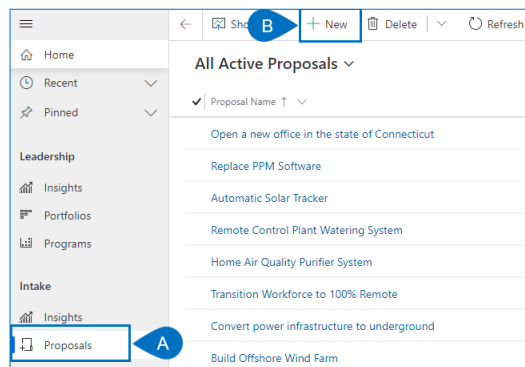
Portfolio/Program Manager



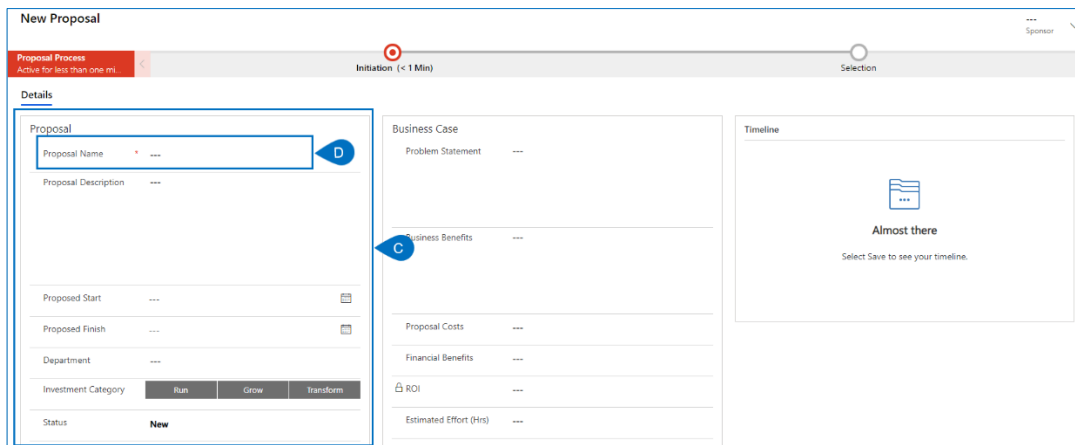
Portfolios – New Proposal

1. DEFINE THE NEW PROPOSAL

- a. Ensure you are in **Portfolios** 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

Proposal Process: Active for less than one m. | Initiation (< 1 Min) | Selection

Details

Proposal

Proposal Name: (D)

Proposal Description:

Proposed Start:

Proposed Finish:

Department:

Investment Category: ☐ Run ☐ Grow ☐ Transform

Status: **New**

Business Case

Problem Statement:

Business Benefits: (C)

Proposal Costs:

Financial Benefits:

ROI:

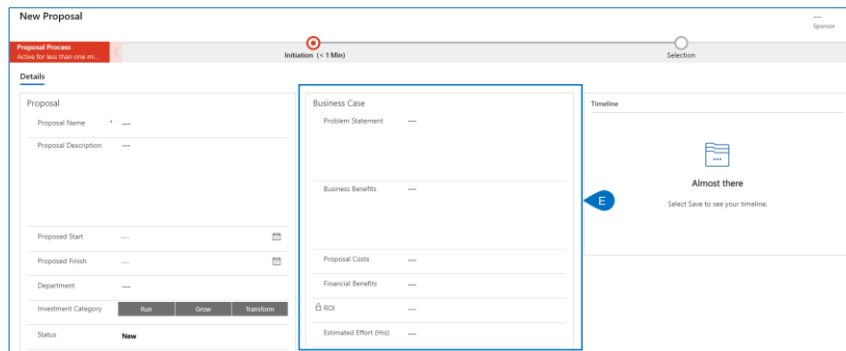
Estimated Effort (Hrs):

Timeline

Almost there

Select Save to see your timeline.

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



New Proposal

Proposal Process: Active for less than one m. | Initiation (< 1 Min) | Selection

Details

Proposal

Proposal Name:

Proposal Description:

Proposed Start:

Proposed Finish:

Department:

Investment Category: ☐ Run ☐ Grow ☐ Transform

Status: **New**

Business Case

Problem Statement:

Business Benefits: (E)

Proposal Costs:

Financial Benefits:

ROI:

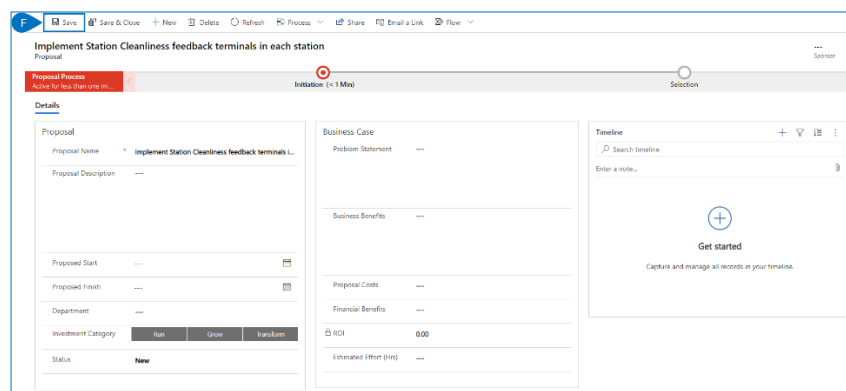
Estimated Effort (Hrs):

Timeline

Almost there

Select Save to see your timeline.

f. Click **Save** to create the Proposal and activate the **Timeline** pane.



New Proposal

Proposal Process: Active for less than one m. | Initiation (< 1 Min) | Selection

Details

Proposal

Proposal Name: Implement Station Cleanliness feedback terminals L

Proposal Description:

Proposed Start:

Proposed Finish:

Department:

Investment Category: ☐ Run ☐ Grow ☐ Transform

Status: **New**

Business Case

Problem Statement:

Business Benefits:

Proposal Costs:

Financial Benefits:

ROI: 0.00

Estimated Effort (Hrs):

Timeline

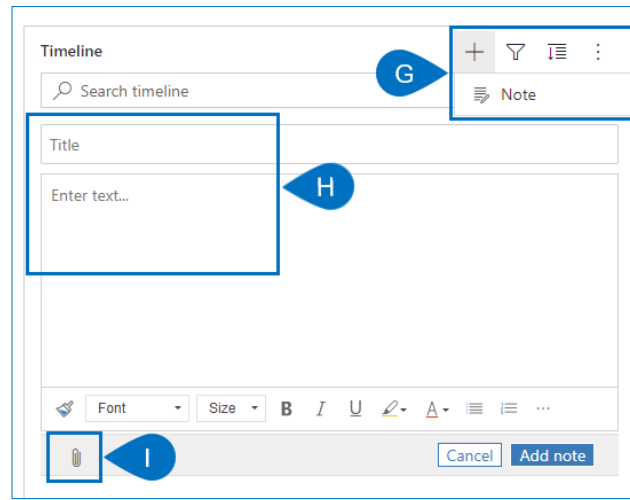
+ Get started

Capture and manage all records in your timeline.

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

Search timeline

Title

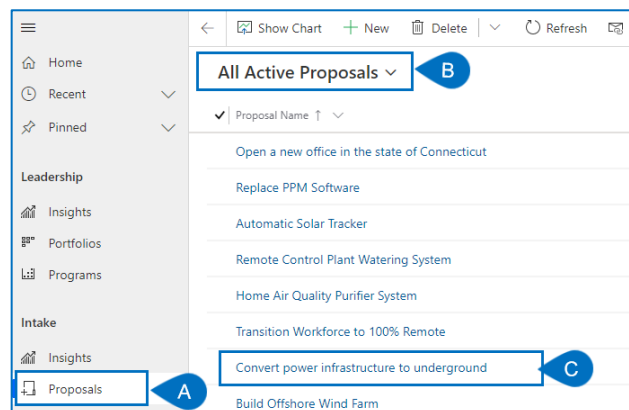
Enter text...

Font Size B I U A

Cancel Add note

2. UPDATE AN EXISTING PROPOSAL

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



Home Recent Pinned Leadership Insights Portfolios Programs Intake Insights Proposals

Show Chart New Delete Refresh

All Active Proposals

Proposal Name ↑

- Open a new office in the state of Connecticut
- Replace PPM Software
- Automatic Solar Tracker
- Remote Control Plant Watering System
- Home Air Quality Purifier System
- Transition Workforce to 100% Remote
- Convert power infrastructure to underground
- Build Offshore Wind Farm

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

Defining proposal resource requirements

Portfolio/Program Manager Portfolios - Current Proposal – Resource Plan

1. CREATE GENERIC RESOURCE REQUESTS

a. Open the **Resource Plan** tab.

b. Search for and select the **Generic resources** with the skills that will be **required on the project** if the **proposal is approved**.

- c. On a time-period basis, define the **number of hours** each generic resource will be required to complete the project. If **multiple resources** are required, ensure the number of hours **reflect the total effort** to be completed.

Details Resource Plan Override Sell Rates										
Search <input type="text"/>		consult <input type="text"/>		July 2022 25						
Requests by Primary Role		Visible Period Total ←	September 2022		October 2022		November 2022		December 2022	
		P	P	A	P	A	P	A	P	A
Totals		8,150.0	525.0	0.0	525.0	0.0	875.0	0.0	875.0	0.0
Marketing		600.0	75.0	0.0	75.0	0.0	75.0	0.0	75.0	0.0
Generic		600.0	75		75		75		75	

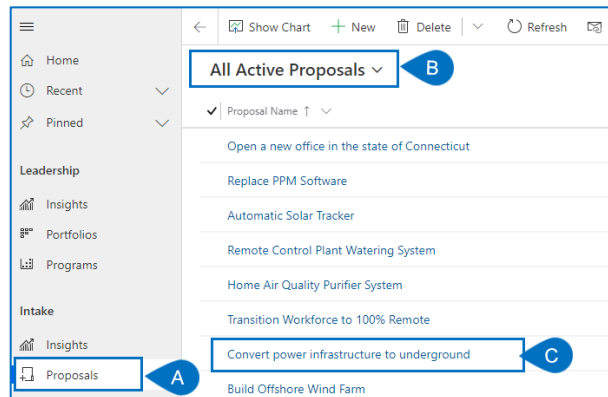
- d. Click **Save** from the at the bottom of the form when you are done.

Managing the proposal approval process

Portfolio/Program Manager Portfolios - 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.



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

← | | G | Save & Close | + New | Delete | Refresh | Process | Share | Email a Link

Convert power infrastructure to underground

Proposal Convert power infrastructure to underground

Proposal Process
Active for 8 months

Details

Proposal

Proposal Name *	Convert power infrastructure to underground
Proposal Description	Convert the entire power infrastructure in New England from above ground to underground.

Initiation (8 Mo)
Active for 8 months

Business Case completed? *	<input type="checkbox"/> Incomplete
✓ Project Manager *	Deirdre Rogusky
Departmental Approval? *	<input type="checkbox"/> Incomplete

Next Stage >