

Creating and Managing Proposals



Portfolio/Program/Project Manager



Portfolios




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 the platform in the classroom. While the examples used herein may be different from (or not available) in your organisation's platform instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the platform.

Please note the Job Aid for **Creating and Managing Proposals** within the Learning section 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

Name	Implement Station Cleanliness Feedback Terminals in Each Station
Description	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.
Proposed Start	Select September of the current year from the date picker 
Proposed Finish	Select September of the following year from the date picker 
Department	Select from the list 
Investment Category	Run
Status	New

Business Case

Problem Statement	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.
Business Benefits	We are experiencing significant rider discomfort with dirty stations and believe it is a contributing factor to decreased rider volumes. Cleaner stations should allow us to maintain our current rider volumes.
Proposal Costs	\$20,000
Financial Benefits	\$850,000
ROI	Locked field  – will automatically calculate once form is saved
Estimated Effort	200




Timeline Note 1

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


Timeline Note 2

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

Set B: Proposal

Name	Transition Workforce to 100% Remote
Description	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.
Proposed Start	Select December of the current year from the date picker 
Proposed Finish	Select December of the following year from the date picker 
Department	Select from the list 
Investment Category	Transform
Status	New

Business Case

Problem Statement	Everyone has been directed to work from home.
Business Benefits	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.
Proposal Costs	\$450,000
Financial Benefits	\$1,500,000
ROI	Locked field  – will automatically calculate once form is saved
Estimated Effort	2000

Timeline Note 1

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

Timeline Note 2

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