

#	Process Steps	Additional Info
1	<p>Idea Document Prior to being discussed, an idea document should be created to facilitate discussion of the concept.</p>	<p>Ideas can come from any source. Many enhancements will come from continuing client requests or issues identified by Professional Services (1a) however they can also come from any other departments or sources (1b).</p> <p>The document should have:</p> <ul style="list-style-type: none"> • name/title – a simple way to refer to the idea • brief description – what the idea is and how it would work • business case – description of the need it files or value it will provide
2	<p>Idea Meeting A regularly scheduled meeting will be held every other month or as deemed necessary, to evaluate ideas for enhancing or improving the product.</p>	<p>This will be a regular opportunity to review previously shelved or rejected, located in the Idea Repository (3).</p> <p>At least one representative from all departments can and should participate in this as it will be a forum for open exchange of ideas and thoughts. A list of ideas will be generated from this meeting and a Preliminary Review (4) will either occur at the meeting itself or in a subsequent review by Product Management.</p>
3	<p>Idea Repository The idea repository will be the centralizing point to maintain ideas for product enhancement.</p>	<p>This repository will be maintained by Product Management. It will consist of a spreadsheet containing:</p> <ul style="list-style-type: none"> • name/title – what is the idea called • description – brief description of the idea • business case – what is driving this idea; for example: is it clients, industry/market shifts, investor/partner needs, etc. • notes – other notes about the idea such as initial reactions, patent potential, etc. • date entered – when the idea was added to the list • source – where the idea originated • date reviewed – when the idea was last reviewed • rating/priority – 1 to 5, with 1 being the highest and 5 the lowest; 4's and 5's may not be re-reviewed as often as others • additional info – links to additional documentation if available
4	<p>Preliminary Review A first review of the idea based on rating/priority, available bandwidth, and other factors such as market and strategic business needs.</p>	<p>If rejected for the current release schedule, it is put back into the Idea Repository (3). If given approval to proceed, it moves on to Executive Presentation Documentation Creation (5).</p>
5	<p>Executive Presentation Documentation Creation The process of creating a document that will allow for executive review and approval of the enhancement idea.</p>	<p>This documentation portion of the process could involve or be entirely handled by other department personnel depending on the source of the idea/concept. It should adhere to the standard format and be reviewed by Product Management prior to the meeting presentation.</p>

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6	<p>Executive Presentation Document Used in the executive review presentation. Consists of a text document and, optionally, a presentation document.</p> <p>The text document template is here.</p> <p>The presentation document template is here.</p>	<p>This document follows a standard format and contains:</p> <ol style="list-style-type: none"> a) name/title b) description c) business drivers d) value – how is it valuable to the company: is it a unique differentiator or patentable; does it keep the product on-par with potential competitors; does it position the product to make it more interesting to investors/partners e) success metrics – defines how this development will be measured as a success f) scope – a high-level assessment of what resources the project is likely to need, defined on a departmental basis: <ol style="list-style-type: none"> 1) extreme – difficult to estimate; very high and likely to involve an entire department on a virtually full-time basis; will likely need to be broken into several smaller projects (>90%) 2) high – significant impact on the department; will need tight coordination and committed resources (50% - 90%) 3) medium – a moderate commitment of resources of up-to 3 days each week (10% - 50%) 4) low – possibly a few hours spread out (2% - 10%) 5) tiny – very little involvement at a cursory level (<2%) g) recommendation summary – an overall assessment of the idea, the value, and impact, and what sort of priority it should be given.
7	<p>Executive Review A high-level review of the idea based on rating/priority, and factors such as market and strategic business needs.</p>	<p>If rejected for the current iteration timeline, it is put back into the Idea Repository (3). If given approval to proceed, it moves on to Departmental Presentation Documentation Creation (8).</p>
8	<p>Departmental Presentation Documentation Creation The process of creating a document that will allow for departmental review and approval of the enhancement idea.</p>	<p>This process involves more detailed input and involvement from all departments regarding the expected impact on each. It should adhere to the standard format and be reviewed by Product Management prior to the meeting presentation.</p>

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9	<p>Departmental Presentation Document Used in the departmental review presentation. Consists of a text document and, optionally, a presentation document.</p> <p>The text document template is here.</p> <p>The presentation document template is here.</p>	<p>This document follows a standard format and contains the information in the Executive Presentation Document, plus additional information specific to the impact on other departments. It includes a proposed general timeline, and resource needs are defined in greater detail.</p>
10	<p>Departmental Review A high-level review of the idea based on rating/priority, resource availability, and other business drivers. It allows for input from all departments on improving or increasing viability of the idea/concept.</p>	<p>If rejected for the current iteration timeline, it is put back into the Idea Repository (3). If given approval to proceed, it moves on to Product Management: Product Development Process (11).</p>
11	<p>Product Management: Product Development Process Once the idea/concept has been approved and prioritized, it moves into the next stage where all the details and specifics of its development are identified and tracked.</p>	