



ENGAGE

Become a Demand Intake Pro

Alana Suter, Rachel Alldredge, Zachary Thornwood

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Speakers



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Smartsheet



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Smartsheet



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Senior Analyst
Maximus



Learning Objectives

You should leave here feeling confident about...

- 1 How to implement a well-defined intake process and ensure all stakeholders have visibility into it
One **route of intake** or multiple routes involving integrations
- 2 Understanding what information is needed in order to move into the prioritization stage effectively
Identify **when data is required** for decision making and how to collect it
- 3 Establishing metrics that give transparency to the amount and variation of requests
What **metrics** would be helpful to making intake decisions?

Coming Up...

Agenda

1

I'm Using Intake Forms -
Now What?

2

Maximus - Intake Solution
Examples

3

Advanced Intake - Using
Integrations

1

**I'm Using Intake Forms - Now
What?**

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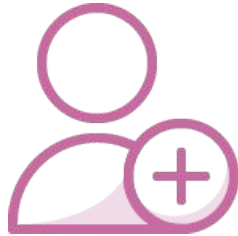
Intake Process

Submission and Review of Requests



Automate Submission

Or



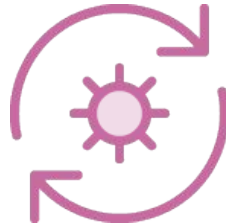
Manually Add Submission



Display Requests



Review



Route



Refine



Manage Approvals

2

Maximus - Intake Solution Examples

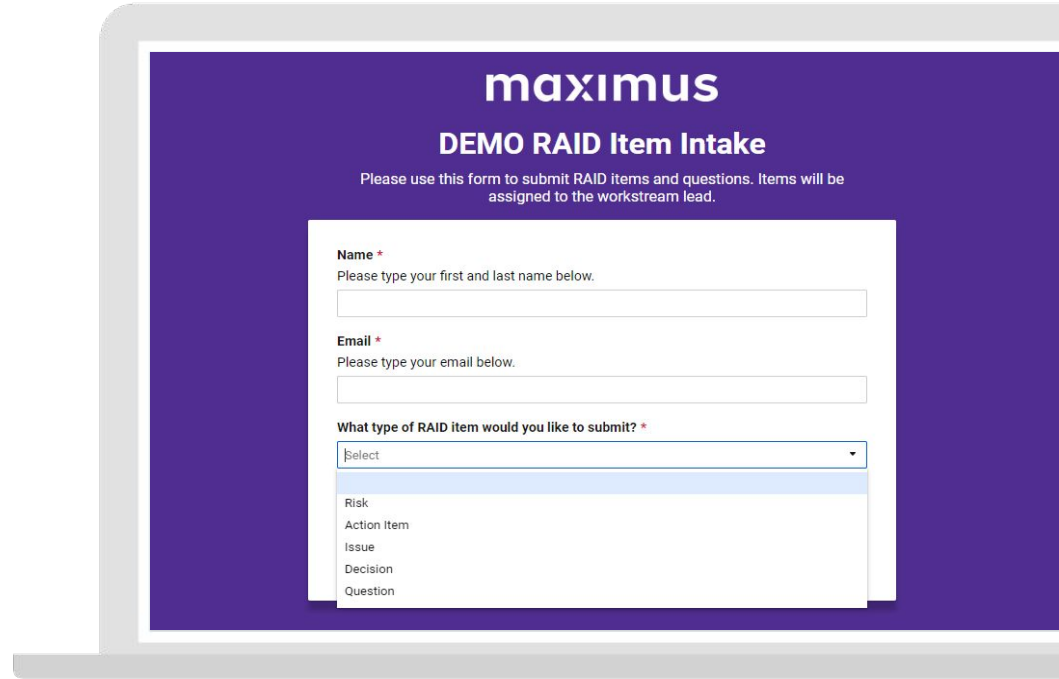
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RAID Item Intake

- **Challenge:** Create an easy-to-use way for users to submit RAID log items for a complex project implementation



- **Solution:** Single intake form utilizing descriptive help text, logic and automations to assign and move items

A screenshot of a web form titled "maximus DEMO RAID Item Intake". The form is set against a purple background. It includes a header with the "maximus" logo and the title "DEMO RAID Item Intake". Below the title is a sub-header: "Please use this form to submit RAID items and questions. Items will be assigned to the workstream lead." The form contains three main sections: 1. "Name *" with a sub-header "Please type your first and last name below." and a text input field. 2. "Email *" with a sub-header "Please type your email below." and a text input field. 3. "What type of RAID item would you like to submit? *" with a dropdown menu. The dropdown menu is open, showing options: "select", "Risk", "Action Item", "Issue", "Decision", and "Question".

maximus

DEMO RAID Item Intake

Please use this form to submit RAID items and questions. Items will be assigned to the workstream lead.

Name *
Please type your first and last name below.

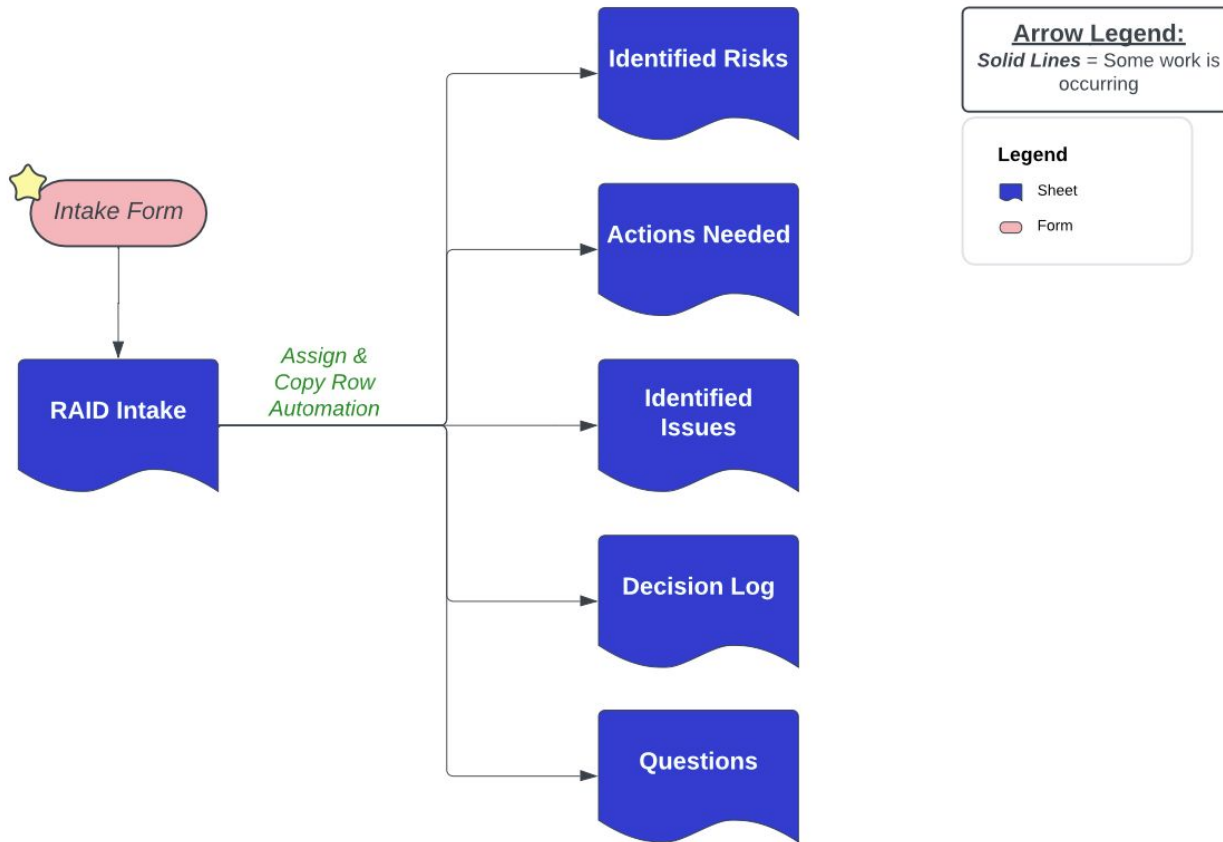
Email *
Please type your email below.

What type of RAID item would you like to submit? *

select

- Risk
- Action Item
- Issue
- Decision
- Question

RAID Item Intake



Change Management

- **Challenge:** Create a Change Management tool that would provide a place to input requests, see updates in real time, and encourage stakeholder engagement



- **Solution:** WorkApp with pages corresponding to specific roles. In particular, utilizing a dashboard as the first page in the stakeholder role to quickly summarize information

A screenshot of a web application interface for 'maximus'. The page title is 'DEMO Steering Committee Items'. On the left is a navigation sidebar with options: 'View as Steering Committee', 'Try new experience', 'DEMO Change Management Dashboard', 'DEMO Steering Committee Items', 'DEMO Change Management Form', and 'DEMO Development Calendar'. The main content area shows a table of items with columns for Ticket ID, Workstream, Title, Priority, and Development Status. The table contains 19 rows of data, each with a colored background corresponding to its priority and status.

Ticket ID	Workstream	Title	Priority	Development Status
INEOST-20230519-444	Provisioning	Review and revamp Provisioning WorkApp and all related processes	1	On Hold
INEOST-20240326-734	Provisioning	Explore new/duplication of provided tracker for Provisioning use	2	On Hold
INEOST-20230503-420	Provisioning	Update, create, or add Equipment Tracking process to SMS	3	On Hold
INEOST-20240530-792	Ops Support	Incorporate Training into Check in Submissions form/sheet	4	In Development
INEOST-20231017-559	Operations - RCC	Add Emergency Contact information to system	5	Discovery
INEOST-20240319-728	WFM	Enhance New Hire/Training Attendance Process per Scott's details	6	Discovery
INEOST-20230519-445	Ops Support	Review Transition Workspace with Project Leadership and incorporate any processes requested into the SMS	7	Discovery
INEOST-20231208-617	Digital Support Tools	Rename assets and update field selections in HRST	8	Discovery
INEOST-20240328-739	Ops Support	Create notifications based on certain changes in the All Staff Roster	9	Discovery
INEOST-20230607-461	Training	Add data analysis for Training to calculate attrition and day 1 attendance	10	Testing
INEOST-20240423-764	Quality	Add optional contact field to Metric 21 form and update reports	15	Discovery
INEOST-20240424-765	Quality	Separate Metric 21 archives by year	16	On Hold
INEOST-20240604-796	Quality	Create dynamic dropdown logic for EID - Employee Name in M21 Scorecards	17	On Hold
INEOST-20240605-799	Quality	Create an ES to Supervisor Ratio Tracker	18	On Hold
INEOST-20240610-801	Operations - CCC	Create unscheduled absence attendance tracker for CCCs	19	Testing

Change Management

Smartsheet Tickets & Development

★ WorkApps



Intake Form

Ticket Intake

Review &
LOE
Analysis

Review,
Prioritize,
& Execute

Operations & Maintenance

Steering Committee

New Tickets

Maintenance Tickets

Development Tickets

Steering Committee Dashboard

Dynamic View: Development Tickets

Calendar App: Development Tickets

Arrow Legend:
Solid Lines = Some work is occurring
Dashed Lines = Flow of data with no action needed

Legend

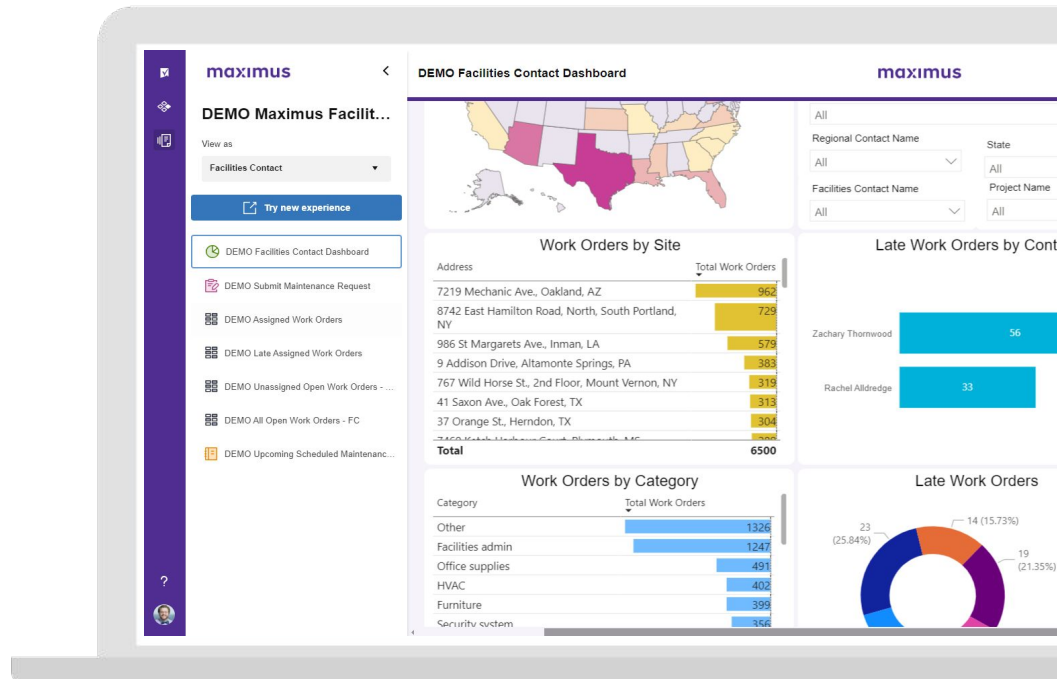
- Sheet
- Form
- Dashboard

Facilities Requests

- **Challenge:** Create a system that allows facilities and facility workers from across our domestic sites submit and manage work orders. Provide leadership with the insight needed to ensure SLAs are met

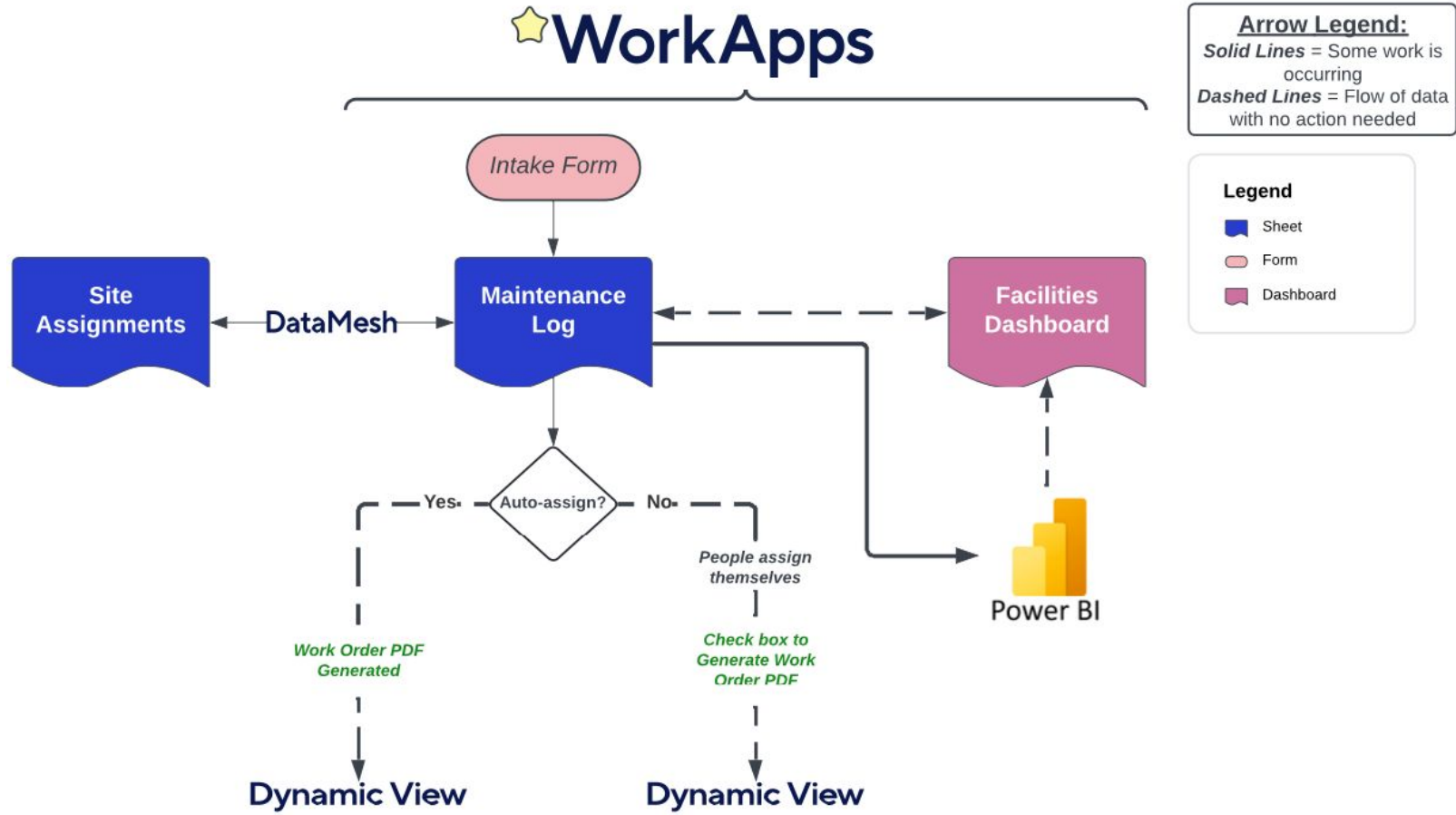


- **Solution:** WorkApp used by all facilities staff, management, and corporate leadership



Maximus Facilities WorkApp

★ WorkApps



Demo

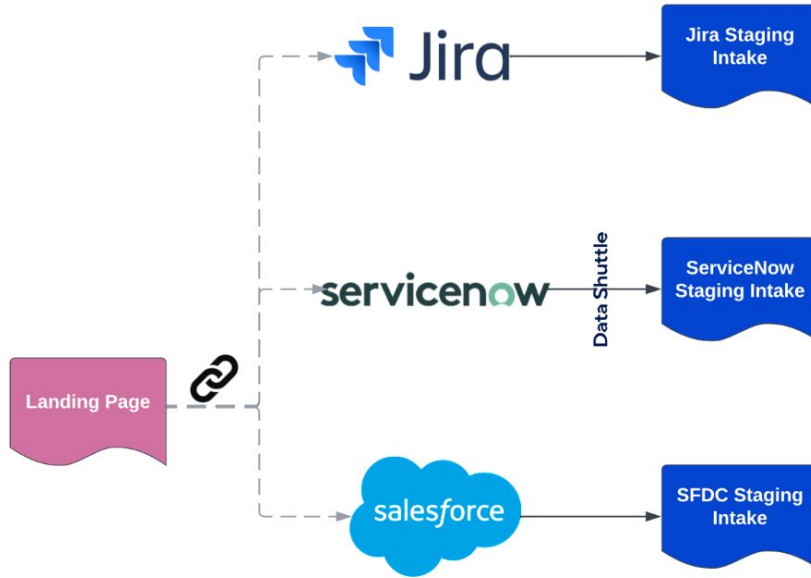
3

Advanced Intake - Using Integrations

Intake Solution With Integrations

Arrow Legend:
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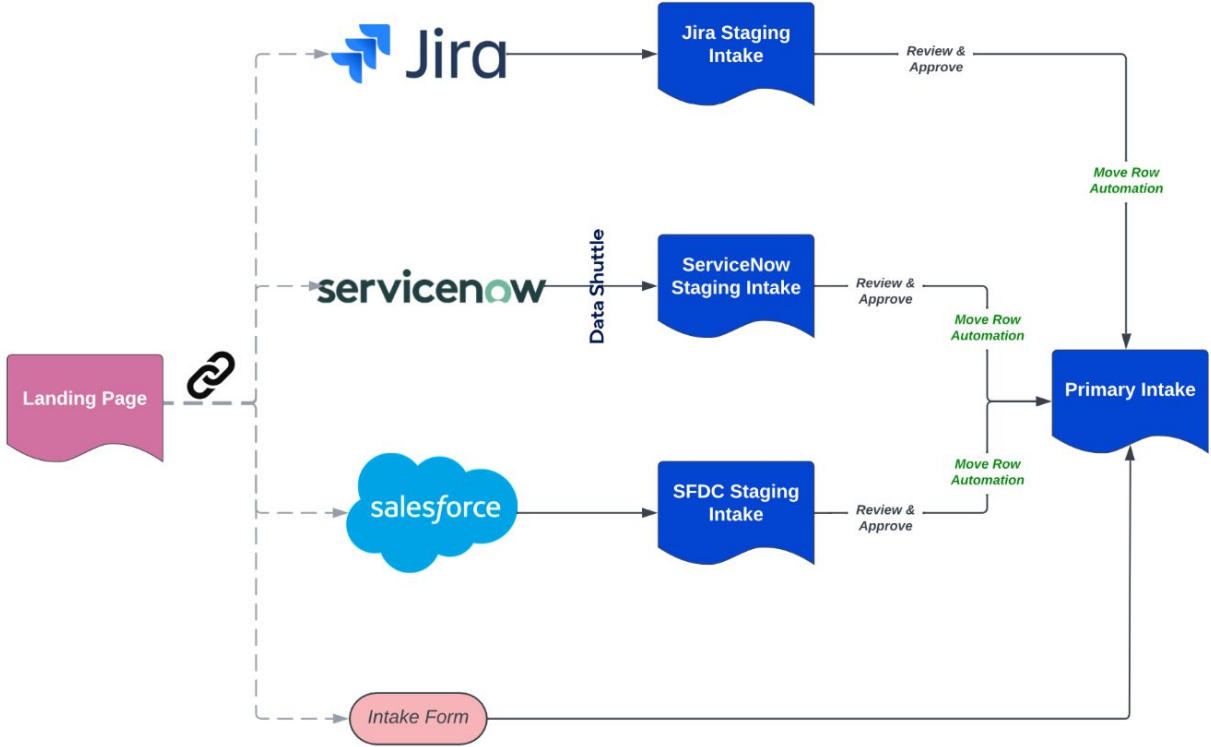
Legend
■ Sheet
■ Dashboard



Intake Solution With Integrations

Arrow Legend:
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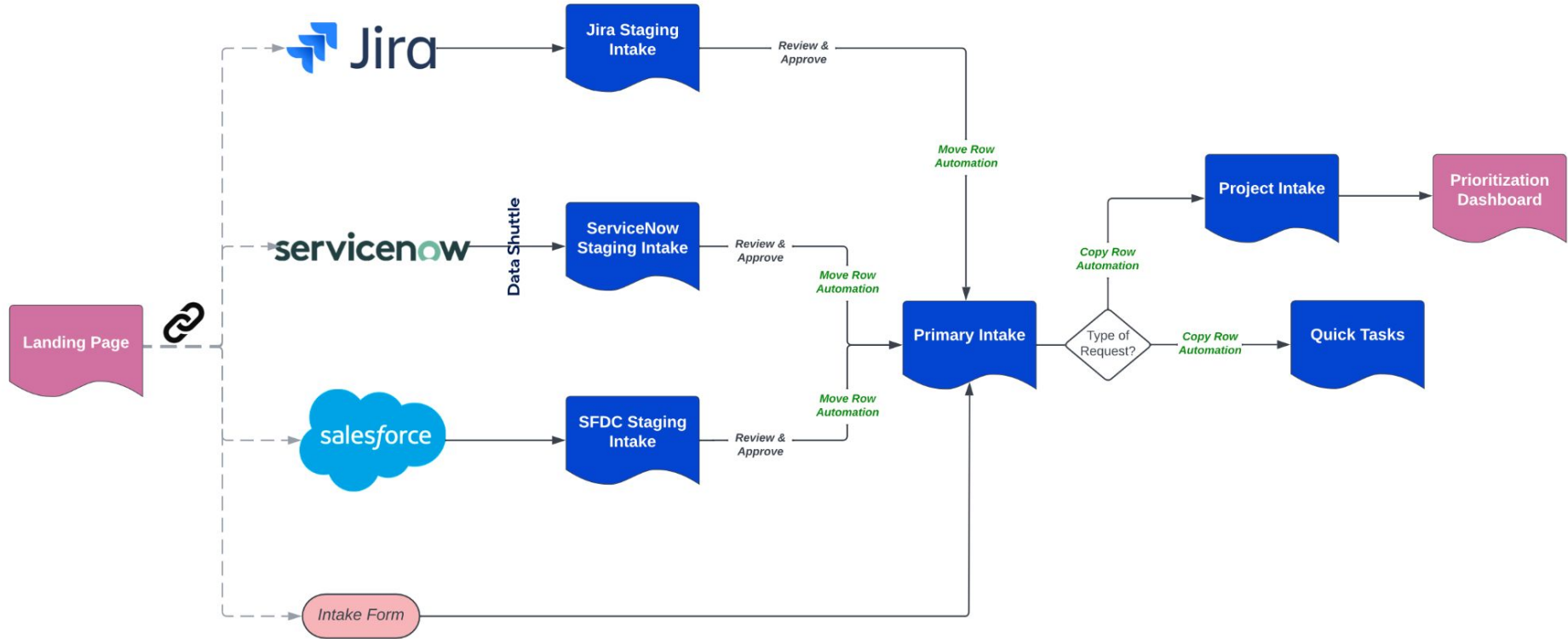
Legend
■ Sheet
■ Dashboard



Intake Solution With Integrations

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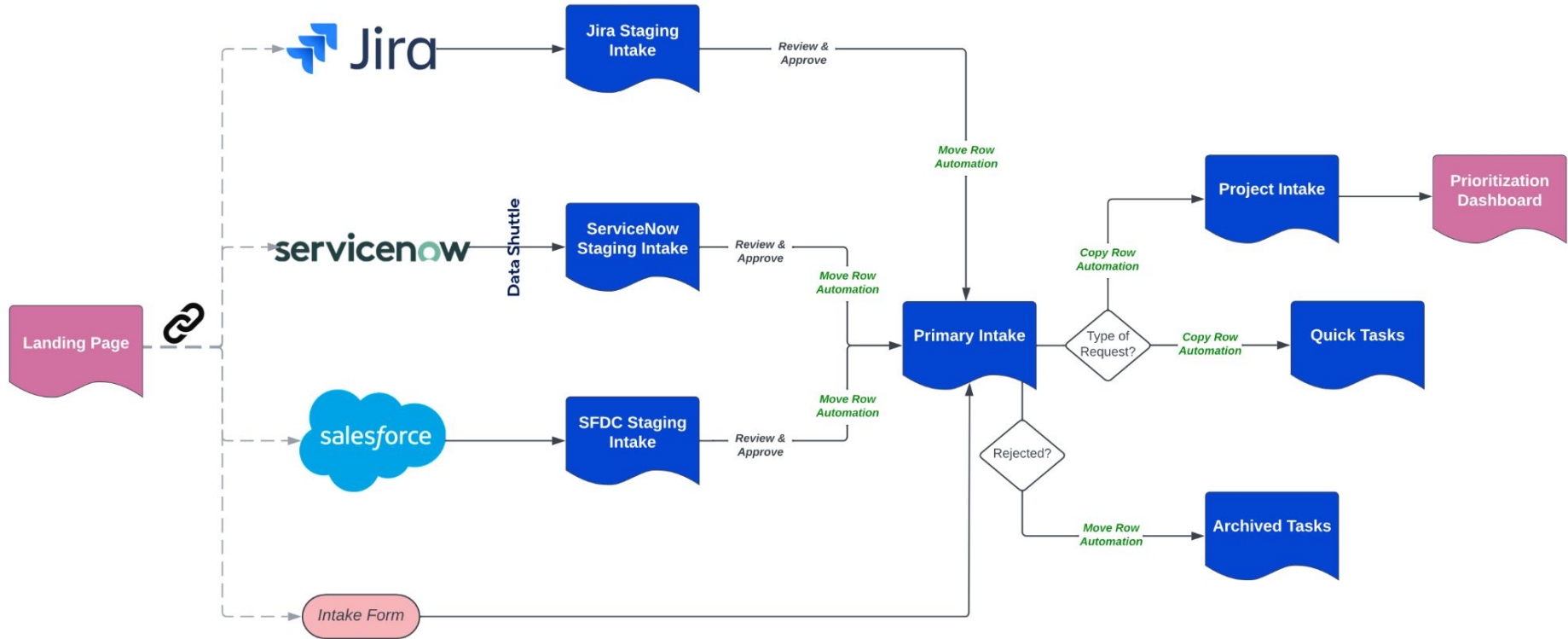
Legend
■ Sheet
■ Dashboard



Intake Solution With Integrations

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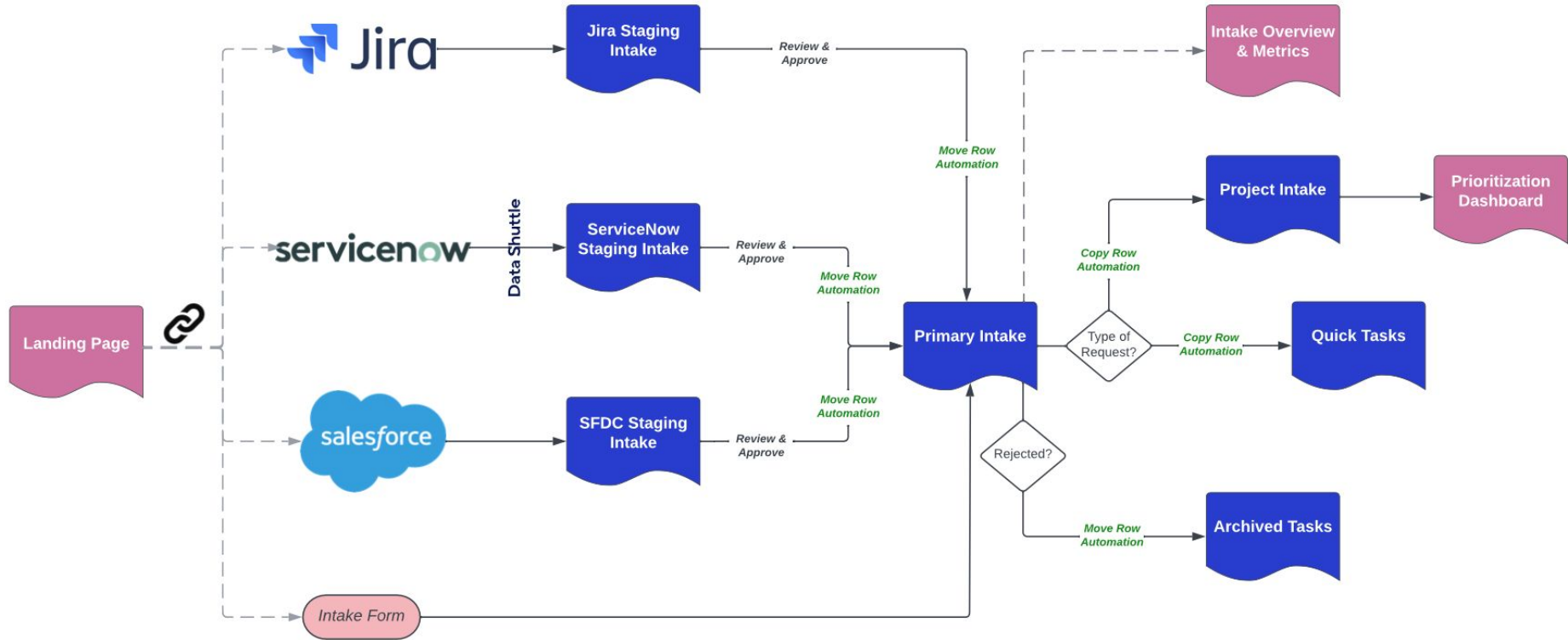
Legend
Sheet
Dashboard



Intake Solution With Integrations

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Legend
■ Sheet
■ Dashboard



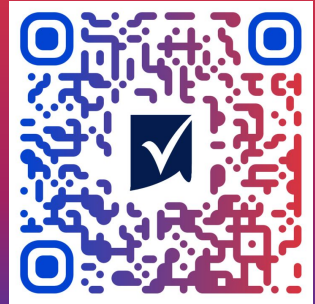
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Next steps...

- Attend the **“Perfecting the art of IT project prioritization”** session
- Visit the **Projects, Programs & Portfolios booth**
- Take the **PPM maturity assessment** to understand how to optimize your project portfolios → See QR code



Take the survey

We'd love to hear your thoughts on the session.

Open this session in the mobile app, click “Survey,” and answer two questions — it's that easy!

Thank you.

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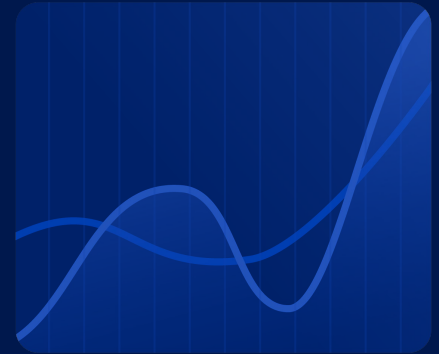
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