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Become a Demand Intake Pro

Alana Suter, Rachel Alldredge, Zachary Thornwood

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Speakers

Alana Suter
Principal Solutions Consultant
Smartsheet

Rachel Alldredge
Solutions Engineer
Smartsheet

Zachary Thornwood
Senior Analyst
Maximus

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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

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1

I’m Using Intake Forms - Now What?

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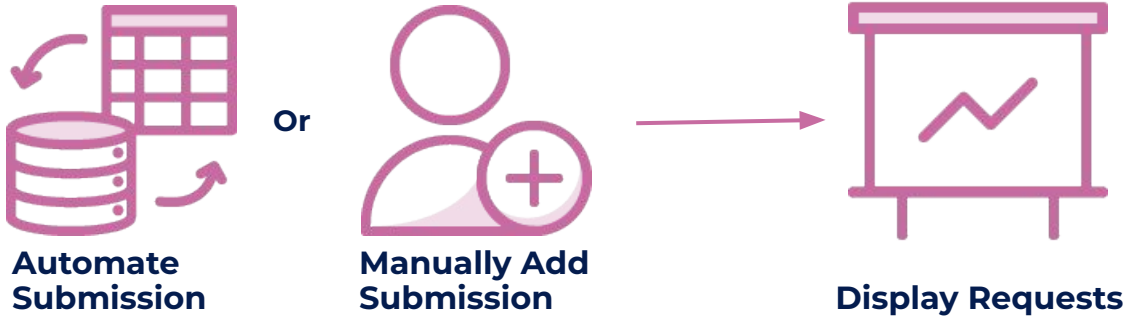
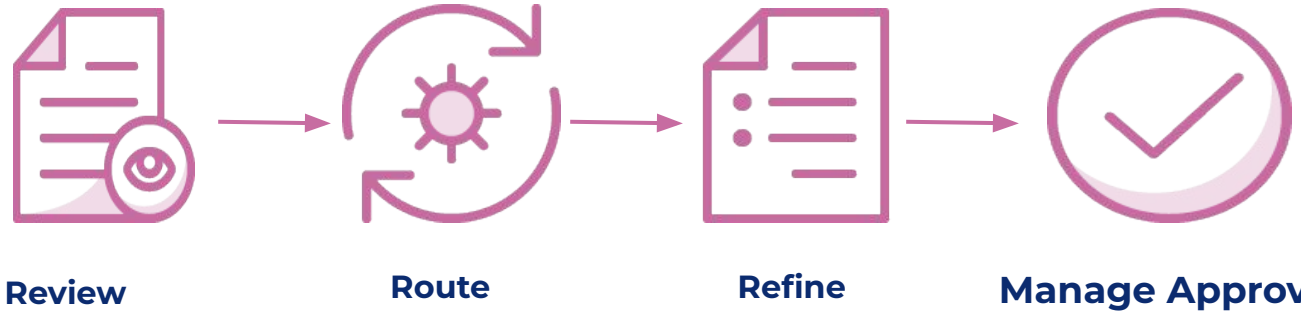
Intake Process

Submission and Review of Requests





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Maximus - Intake Solution Examples

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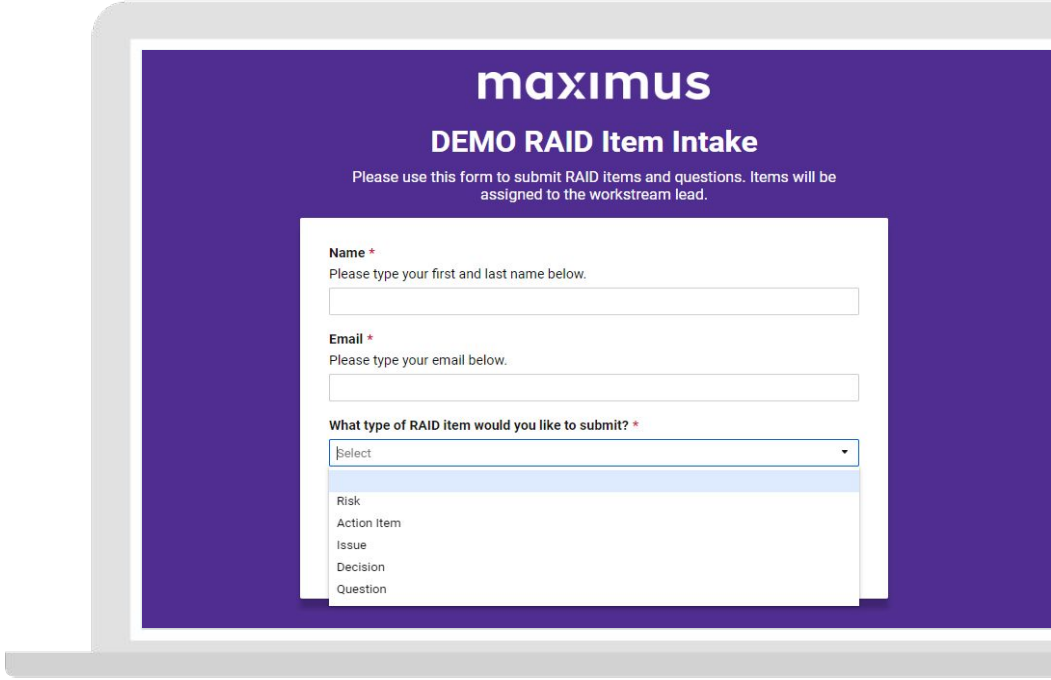
RAID Item Intake

- **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



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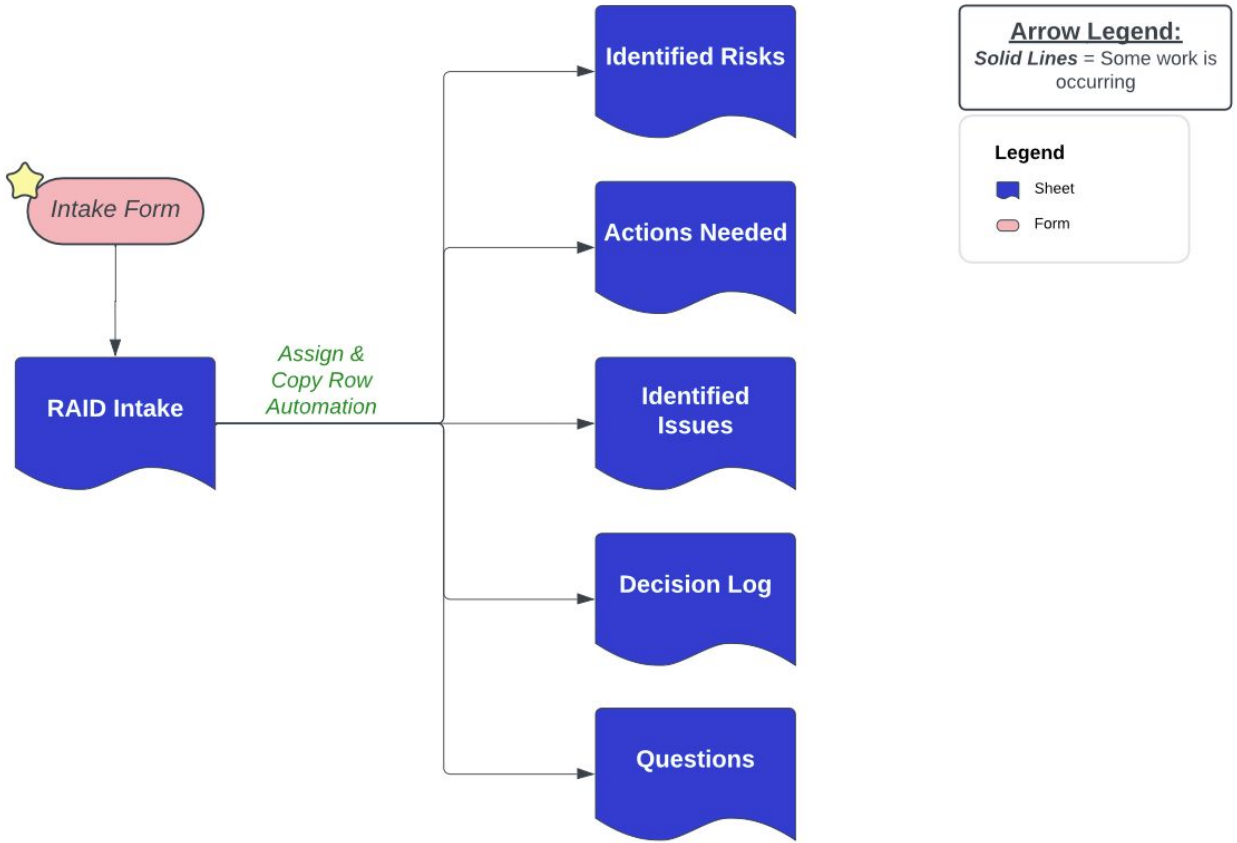
RAID Item Intake



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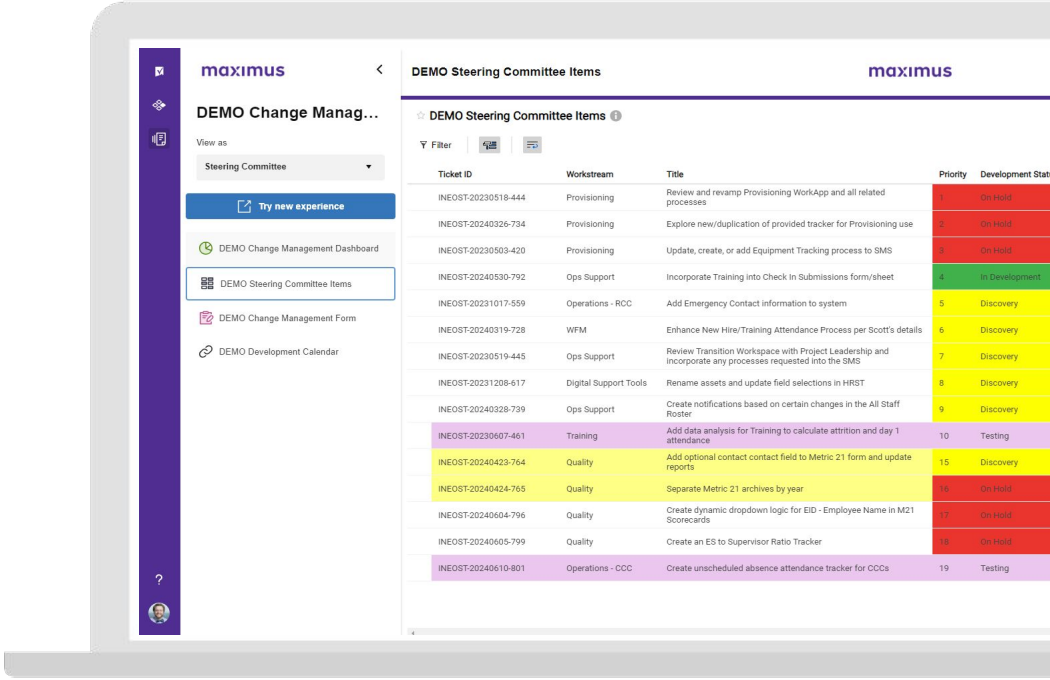
Change Management

- **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



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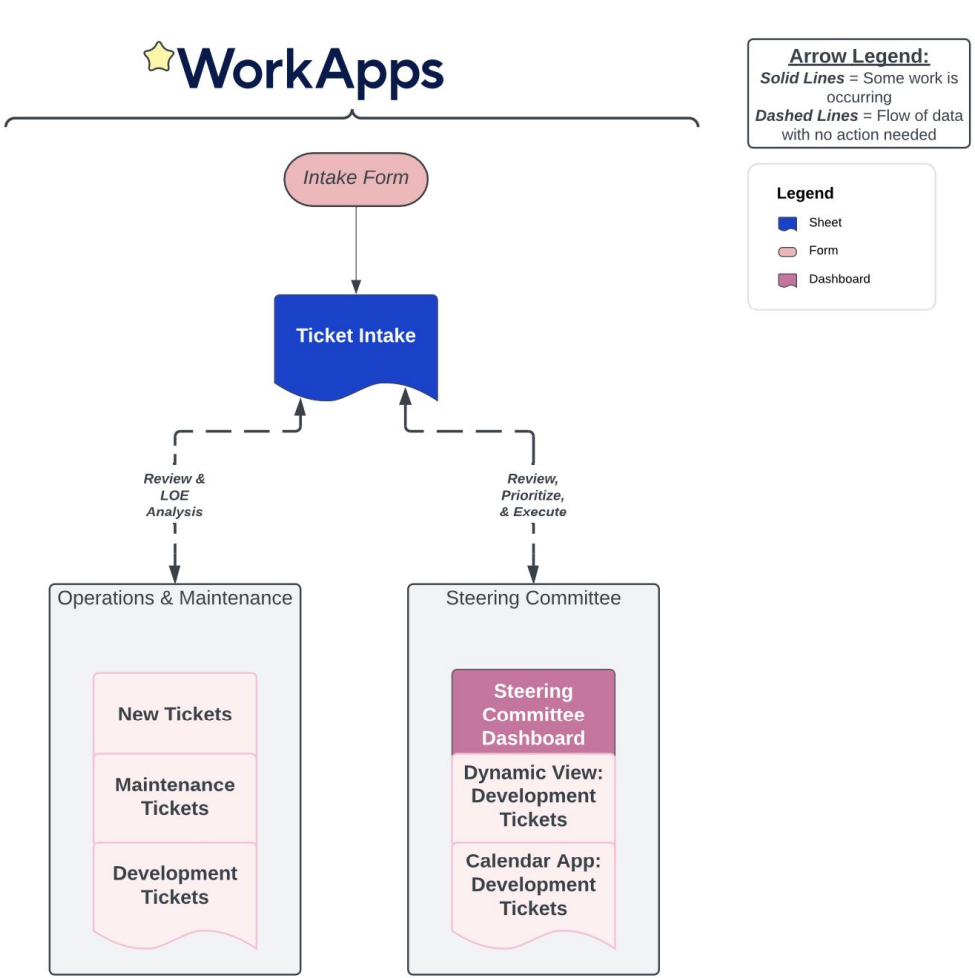
Change Management
Smartsheet Tickets & Development



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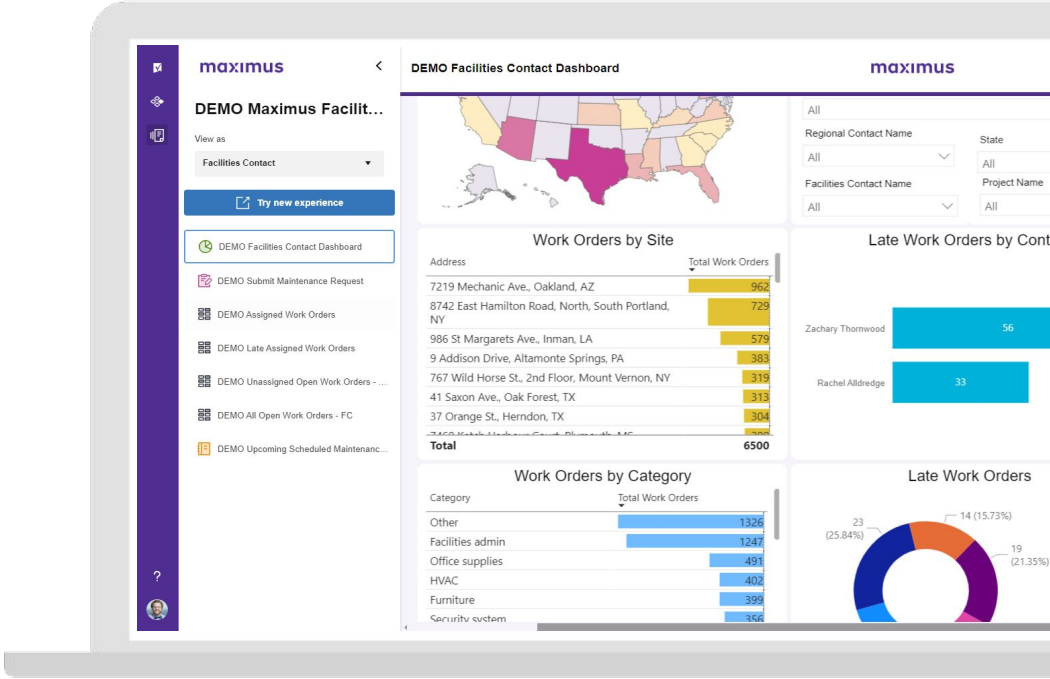
Facilities Requests

- **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



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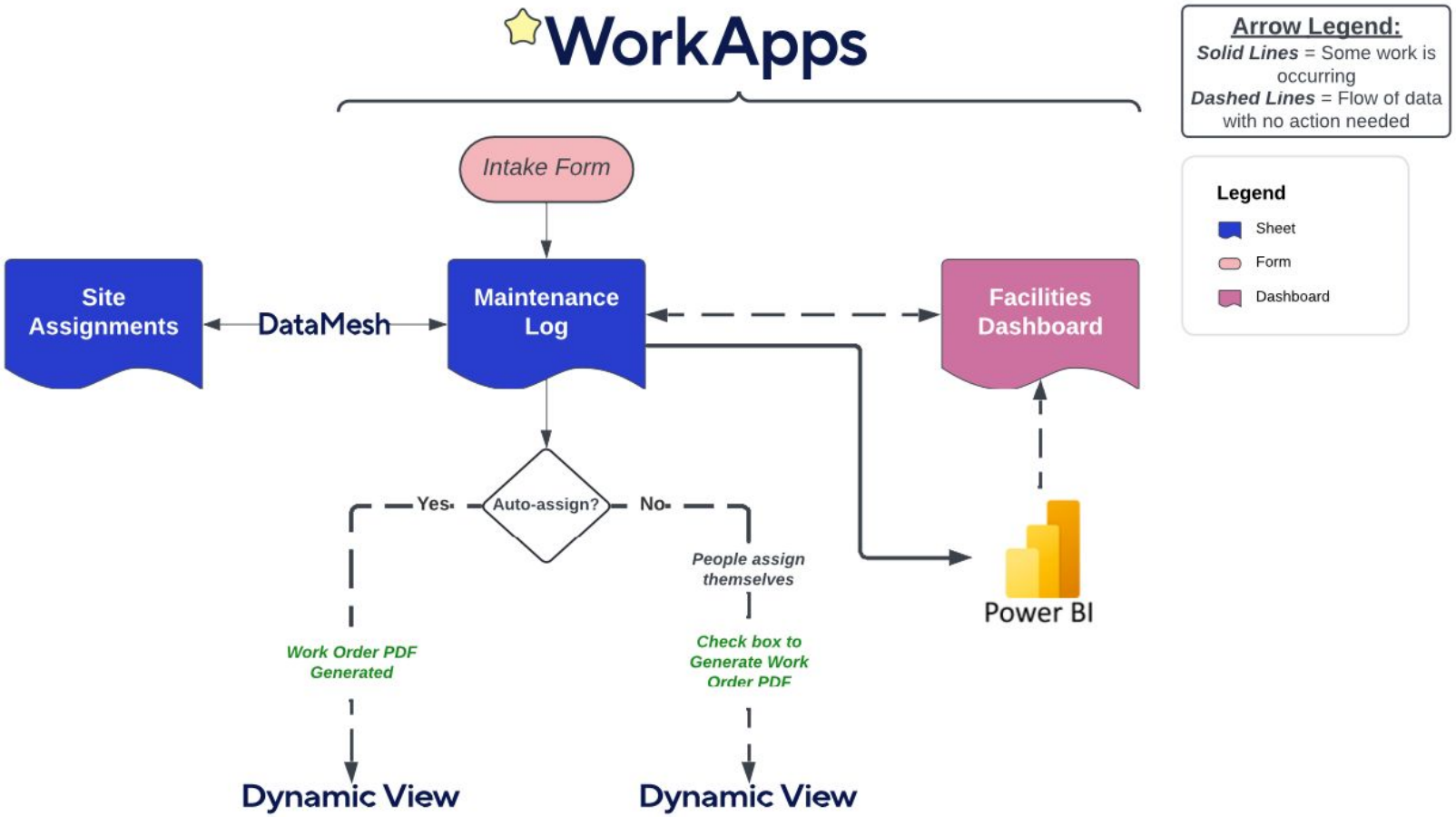
Maximus Facilities WorkApp



Demo

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Advanced Intake - Using Integrations

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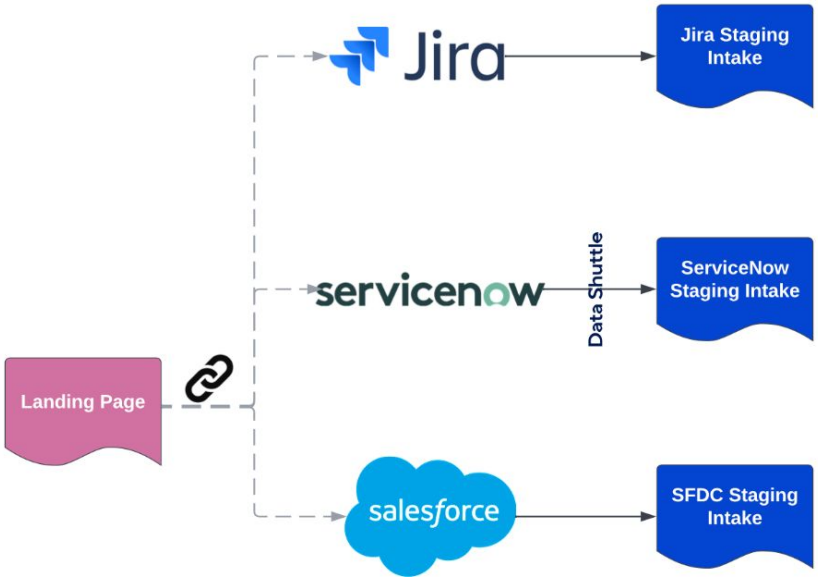
Intake Solution With Integrations

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

Legend
Sheet
Dashboard



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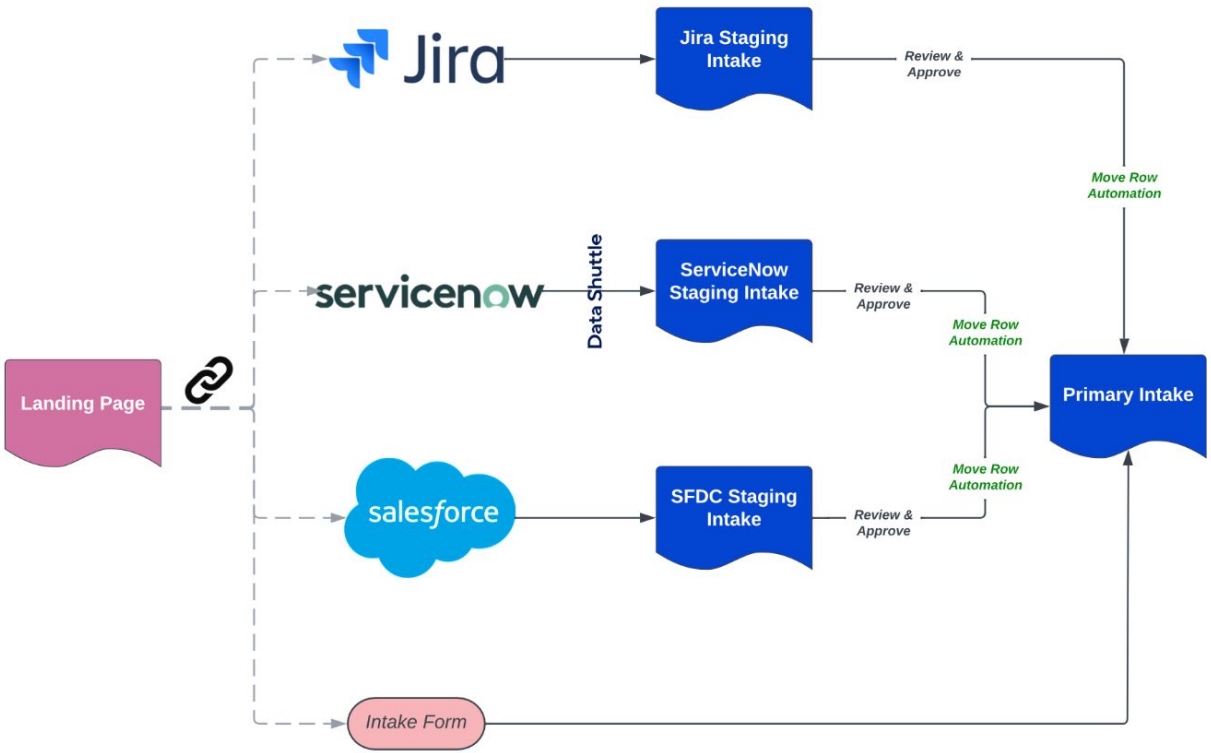

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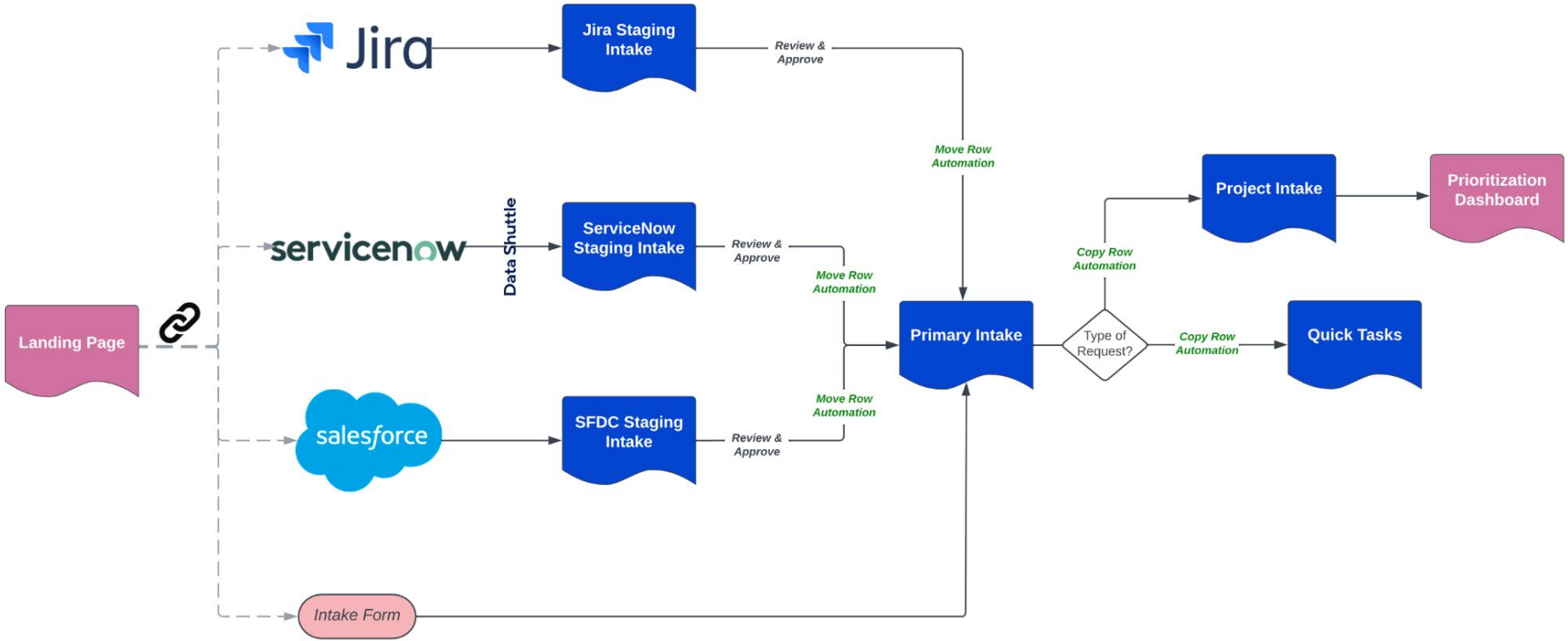

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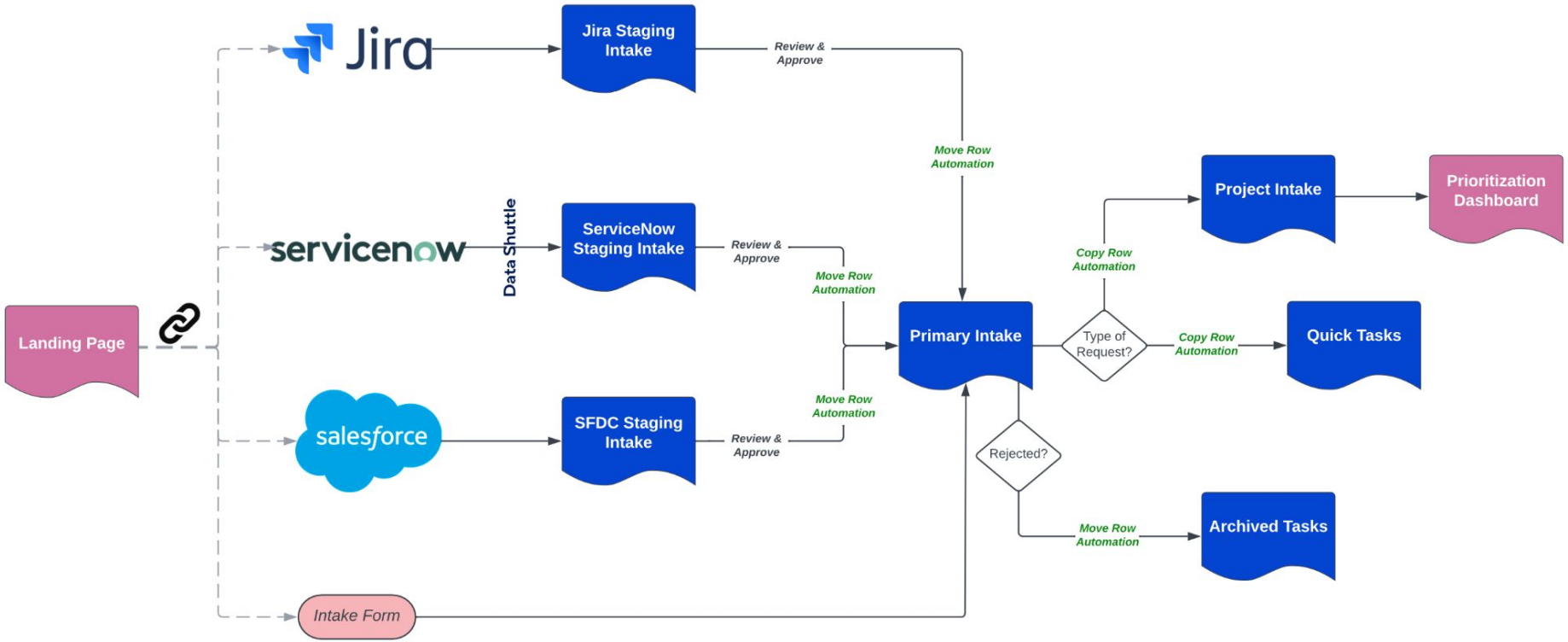

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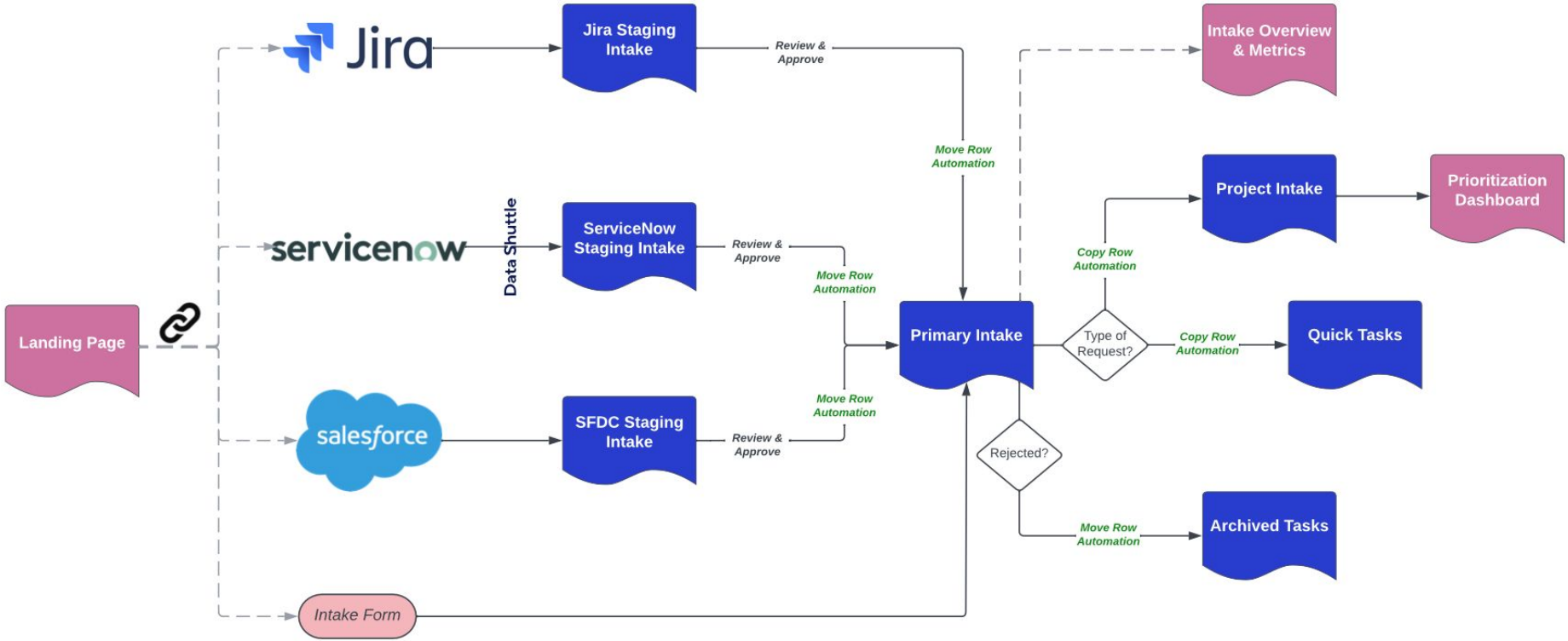

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Next steps...

- 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.

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Thank you.

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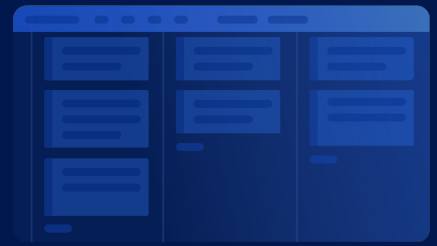

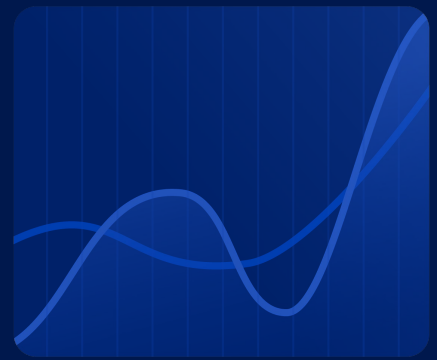

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