



Intake and Prioritization Roundtable | Panel

Your Guides:

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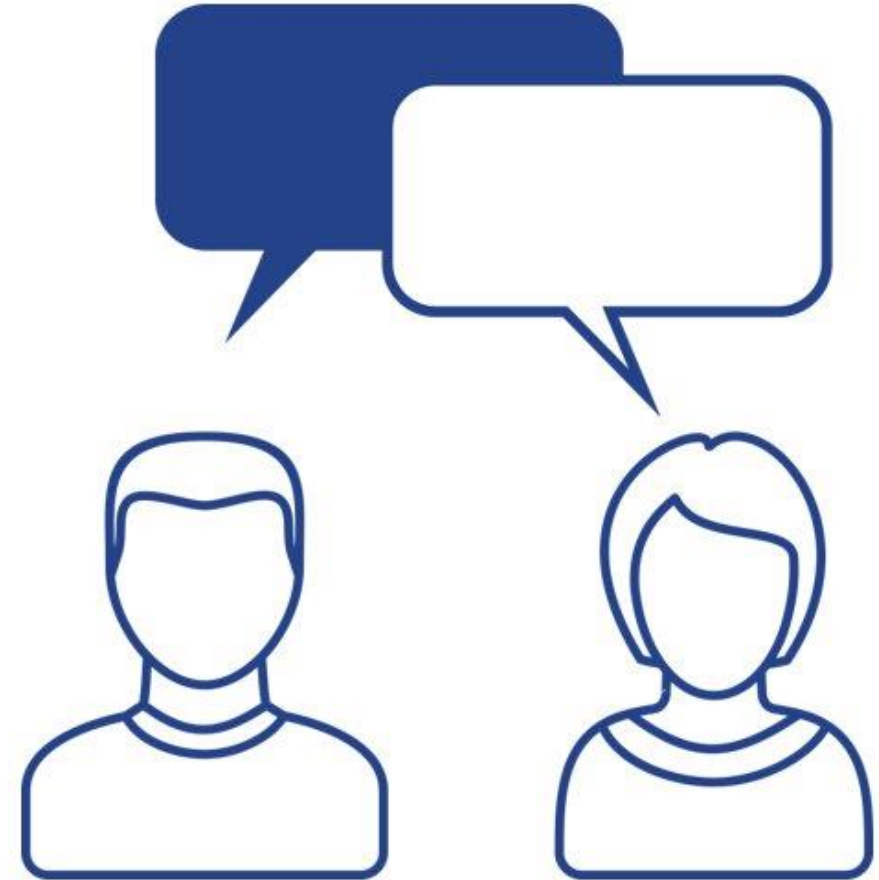
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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Give one word or phrase describing how work is Prioritized in your organization



Getting Started

What Areas do you want to cover today?

- Managing the List and Visibility
- Evaluation and Prioritization
 - Different Lanes for Different Work
 - Goldilocks level of estimation
 - Strategic Fit
 - Capacity to Deliver
 - Saying No
- What happens after approval?



Discussion Questions

Managing the List and Visibility

- 1 Is there one master list of everything in the queue, or does each team or portfolio keep its own?
- 2 How do you catch duplicate or overlapping requests before both move forward independently?
- 3 Who can see the list?



Different Lanes for Different Work

EVALUATION AND PRIORITIZATION

- 1 Does a small enhancement move through the same process as a major initiative?
- 2 Does “keep-the-lights-on” work compete head-to-head with new strategic work for the same capacity, or is it handled separately?
- 3 Do some types of work get approved faster than others? (e.g. Regulatory Requirements)

Goldilocks Level of Estimation

EVALUATION AND PRIORITIZATION

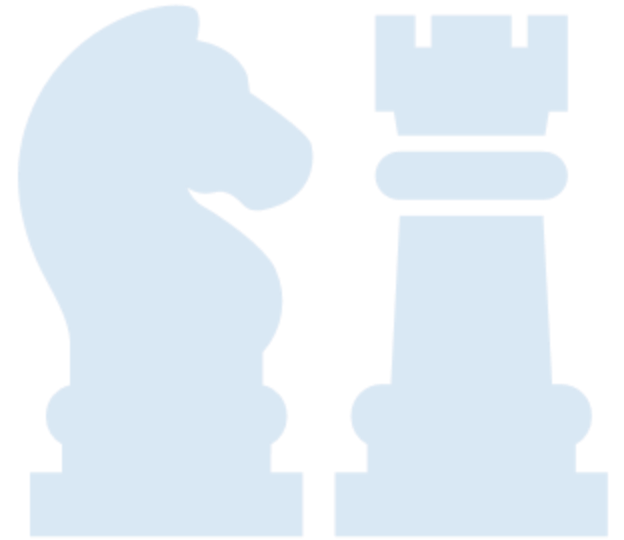
- 1 What level of estimate do you require before something's approved — rough order of magnitude, or something more precise?
- 2 Has too little estimation ever caused a problem at your organization? Has too much?
- 3 Who decides how much estimating effort a request is worth, before you even know if it will be approved?



Strategic Fit

EVALUATION AND PRIORITIZATION

- 1 How tightly is prioritization tied to your stated strategic goals, and who validates alignment?
- 2 Has anything ever scored well on paper but clearly missed the strategic mark? What happened next?
- 3 When priorities shift mid-year, does your intake process shift with them, or does it lag behind?



Capacity to Deliver

EVALUATION AND PRIORITIZATION

- 1 Do you know your available capacity before you commit to something, or find out you're overcommitted after the fact?
- 2 Has anything been approved based on capacity that existed on paper but not in practice?
- 3 Who is accountable when approved work can't start? Are approval and scheduling separate processes?



Saying No

EVALUATION AND PRIORITIZATION

- 1 When something is declined or deferred, is the requester informed?
- 2 Is there a real “no” at your organization, or does everything eventually get squeezed in somehow?
- 3 Is saying No viewed as a positive thing?
(We think it should be)



What Happens After Approval?

- 1 Once something is approved, who owns making sure it actually starts?
- 2 Does anyone recheck the business case when the work is done?
- 3 Does your Intake process result in shuffling in-flight projects?



General Discussion Topics

- 1 When you think of the end-to-end process, what are your biggest pain points?
- 2 When you think of the end-to-end process, what is working well?
- 3 Is anyone using AI to augment the process?



Questions?



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