

HOW DO I RANK/COMPARE PROJECT IDEAS?

OVERVIEW

Ideation is a way of gathering, screening, and managing project ideas at GP. It is the process of forming, collecting, clarifying, screening, and connecting business strategies and objectives to project ideas. Ideation enables the idea for consideration as a potential project (opportunity). The goals of Ideation are to:

- Increase acceptance rate of beneficial ideas
- Streamline the review process
- Establish a clear connection of project ideas to business priorities
- Waste less time on projects that “don’t go”
- Respond to market needs more quickly
- Realize savings faster

The main processes within Ideation are:

1. Create the project idea
2. Submit the project idea for Pre-PO review
3. Pre-PO review of the project idea
4. **Ranking of the project idea**

Research by Independent Project Analysis (IPA) has shown that ranking of projects will provide significant improvement to cost and schedule. This is due to alignment of resources to the most critical projects in a given portfolio.

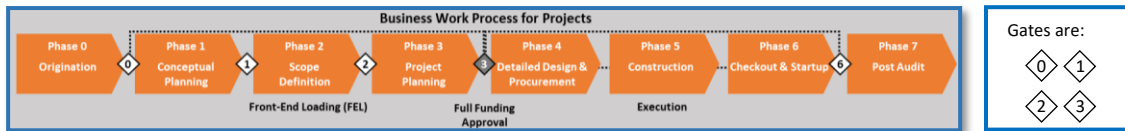
ECOSYS STEPS

To rank a project idea, the following steps are performed in EcoSys:

1. **Rank** against other projects in the portfolio.
2. **Rank** based on system/area.

QUICK REFERENCE TERMINOLOGY

- *Accelerator*: A motivating reason to accelerate a project in the Business Process for Projects (BPP) work process.
- *Approval Workflow*: The distribution path for opportunity/project information (from Pre-P0 to Budget Approval).
- *Deliverable*: A unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a phase. Deliverables define the overall scope and execution plan for the program or project. A Deliverable could be a service, report or product, for example the P&ID's, a mechanical contracting package or an Environmental analysis.
- *Gate*: The review period between phases of the Business Process for Projects work process.



- *Ideation (Pre-Phase 0)*: The time period before Phase 0 (Origination), that covers the process of forming, collecting, clarifying, screening and connecting project ideas/opportunities to business strategies and objectives which enables the idea/opportunity for consideration as a potential project. Ideas can come from anyone within a business or organization.
- *Opportunity*: A reviewed project idea (a project idea becomes an opportunity when it is reviewed at Pre-P0).
- *Opportunity Activation Approval Workflow*: This is performed by the Project Owner who performs Pre – Phase 0 screening and an advances an opportunity to Phase 0 – Origination.
- *Originator*: any GP employee with a project idea.
- *Phase*: A time period within the Business Process for Projects work process, the process that governs how projects are handled across GP, which now includes eight (8) phases from: Pre-P0 (Ideation) through P7 (Post Audit).
- *Phase Gate*: A Phase-Gate is a Waterfall type process that can be used interchangeably with Stage-Gate. It describes a process that has a distinct scope of work performed in a Phase separated by decision points (Gates). GP has typically used the term Phase to describe the work between the Gates, while EcoSys will generally use the word Stage. These words describe the same thing and can be used interchangeably.
- *Project Idea*: An idea for a potential project to solve a potential problem or sustain a competitive advantage.
- *Project Owner*: Typically an Asset Owner, platform leader, etc. that reviews the idea.
- *Validation Count*: The number of deliverables or items open to be completed before an opportunity or project can be submitted to review for advancement or approval. On completing/updating the associated deliverables, the Failure Count is updated. When the Failure Count becomes zero, the project can be submitted for review.
- *Visual Workflow*: A flowchart in EcoSys that shows the current status of the opportunity/project.

STEP-BY-STEP

1 – RANK AGAINST OTHER PROJECTS IN THE PORTFOLIO

a. Navigate to **Projects** > **Opportunity Stage Gates**

The screenshot shows a software interface with a top navigation bar containing 'Portfolios', 'Projects', 'Budgets', 'Changes', 'Progress', 'Forecasts', 'Reports', and 'User'. A dropdown menu is open under 'Projects', listing several options. A red arrow points to 'Opportunity Stage Gates'. Other options in the menu include 'Opportunity Setup', 'Project Setup', 'Project Stage Gates', 'Accelerate Stage Gate', 'Project Schedule', 'Project Power Approvals', and 'Portfolio Budget and Workflow Admin Mass Change'. The background shows a 'Current Period: 2019-02' and a 'Workflow' dropdown with a 'REFRESH' button.

b. Click on the tab 'Ranking'.

c. Click the next to 'Portfolio' on the Parameter bar to select the Portfolio.

The screenshot shows the 'Ranking' tab selected in the software interface. The 'Portfolio' dropdown menu is highlighted with a red box and a red arrow. The dropdown menu shows '* Portfolio: Consumer Products Group'. The background shows 'Current Period: 2019' and a 'Workflow' dropdown with a 'REFRESH' button.

d. Locate the project idea that you want to rank.

The screenshot shows a table of project ideas. The 'Cost Object ID' column is highlighted in orange. A red box highlights the value 'PRJ-E100027' in the 'Cost Object ID' column. The table has the following columns: Opportunity ID, Cost Object ID, Opportunity Name, Status, Phase, Strategic Alignment Selection Score, Environmental Selection Score, Safety and Health Selection Score, Process Safety Selection Score, Business Impact Risk Selection Score, and Product Customer Impact Selection Score. The table contains several rows of data, including 'John Davis Mill Fluidized Bed Bo In Development', 'Brian Subasavage, Mill Fluidizedec Hold', 'Bill Buchholz Mill Fluidized Bed In Development', 'Troy Bennett Mill Fluidized Bed In Development', '10 LB Steam Optimization In Development', 'Start of PRJ-E092809 -Savannah In Development', 'PM20 Wire Skewing Optimizatio In Development', 'Mixed Paper Pulping Active', and 'Improve Efficiency of Producing Active'.

PROJECTS

OPPORTUNITY STAGE GATES

Tip: If you do not see your opportunity in the Opportunity/Project Ranking panel, try the following options:

Option #1: Use 'Filter' on the Spreadsheet Toolbar to search for your project using keywords.



Opportunity ID	Opportunity Name	Status	Project Phase
OPP-E100016	Development of Solid Waste Cell 7	In Development	Phase 0 - Origination

Option #2: At the bottom of the window check 'Show All'. Then, click **REFRESH**.

OPP-E000143	JCM-Test 12-10-18 config update	In Development	Phase 0 - Origination			Savannah	Consumer F
OPP-E000144	Test - New Air Compressor	In Development	Phase 0 - Origination			Cumberland City	Building Prc
OPP-E000145	GJA Test 12/11/2018, Rev 1	In Development	Phase 0 - Origination	12/27/2018	05/31/2019	Savannah	Consumer F

Rows 1 - 11 of 11 Show All Page Size 20

e. Scroll the screen to the right until the column 'Portfolio Rank' appears.

Portfolio	Division	Business	Business Category	Location	Portfolio Rank	System/Area	System/Area Rank
ah	Consumer Products Group	Professional	General	Savannah	0	Logistics	0
	Consumer Products Group	Consumer	Tissue		0	converting	0
ah	Consumer Products Group	Professional	Towel	Savannah	0	Migrated	0
ah	Consumer Products Group	Professional	General	Savannah	0	Pulp System 1	0
ah	Consumer Products Group	Consumer	Tissue	Savannah	0	Paper Mill	0
ah	Consumer Products Group	Professional	General	Savannah	0	Utilities - Landfill	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0

f. Enter in the 'Portfolio Rank' number. The Portfolio Rank field is provided to allow the portfolio managers of site and business portfolios to set in a hierarchy order the position of a given project in relation to other projects.

Portfolio	Division	Business	Business Category	Location	Portfolio Rank	System/Area	System/Area Rank
ah	Consumer Products Group	Professional	General	Savannah	0	Logistics	0
	Consumer Products Group	Consumer	Tissue		0	converting	0
ah	Consumer Products Group	Professional	Towel	Savannah	0	Migrated	0
ah	Consumer Products Group	Professional	General	Savannah	0	Pulp System 1	0
ah	Consumer Products Group	Consumer	Tissue	Savannah	5	Paper Mill	0
ah	Consumer Products Group	Professional	General	Savannah	0	Utilities - Landfill	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0

2 – RANK BASED ON SYSTEM/AREA

a. Scroll the screen to the right until the column 'System/Area Rank' appears.

PROJECTS

OPPORTUNITY STAGE GATES

Portfolio	Division	Business	Business Category	Location	Portfolio Rank	System/Area	System/Area Rank
ah	Consumer Products Group	Professional	General	Savannah	0	Logistics	0
	Consumer Products Group	Consumer	Tissue		0	converting	0
ah	Consumer Products Group	Professional	Towel	Savannah	0	Migrated	0
ah	Consumer Products Group	Professional	General	Savannah	0	Pulp System 1	0
ah	Consumer Products Group	Consumer	Tissue	Savannah	5	Paper Mill	0
ah	Consumer Products Group	Professional	General	Savannah	0	Utilities - Landfill	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0




b. Enter in the 'System/Area Rank' number. The Area Rank field is provided to allow projects owners, of a given area, within a site, to set in a hierarchy order the position of a given project in relation to other projects in their area.

Portfolio	Division	Business	Business Category	Location	Portfolio Rank	System/Area	System/Area Rank
ah	Consumer Products Group	Professional	General	Savannah	0	Logistics	0
	Consumer Products Group	Consumer	Tissue		0	converting	0
ah	Consumer Products Group	Professional	Towel	Savannah	0	Migrated	0
ah	Consumer Products Group	Professional	General	Savannah	0	Pulp System 1	0
ah	Consumer Products Group	Consumer	Tissue	Savannah	5	Paper Mill	2
ah	Consumer Products Group	Professional	General	Savannah	0	Utilities - Landfill	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0
ah	Consumer Products Group	Professional	General	Savannah	0	Energy, Power & Recovery	0

c. Click

CHEAT SHEET

Ranking a project idea in EcoSys involves the following steps:

Actions	No	Step-By-Step Instructions
1 – Rank against other projects in the portfolio	a	Navigate to  >
	b	Click on the tab 'Ranking' .
	c	Click the  next to 'Portfolio' in the Parameter bar to select the portfolio.
	d	Locate the project idea that you want to rank.
	e	Scroll the screen to the right until the column 'Portfolio Rank' appears.
	f	Enter in the 'Portfolio Rank' number.
2 – Rank based on system/area	a	Scroll the screen to the right until the column 'System/Area Rank' appears.
	b	Enter in the 'System/Area Rank' number.
	c	Click  .