



GUIDE:

**Demand Management
For Modern Organizations**



Introduction

The rapid pace of change and the new types of work emerging, as well as shifting priorities, can make navigating and managing demand (incoming work requests) difficult. It is becoming more common for requests, feedback, change requests, and ideas to flow continuously. Organizations need better ways to **prioritize** and select gems from the **Ideas Pipeline** and then prioritize work in progress and new requests all together.

A transparent and established process for managing demand is crucial to success in this environment of uncertainty. Organizations can select the best work to **deliver continuous value** with the help of a well-defined process for collecting and evaluating ideas and work requests.



All incoming requests and ideas should be objectively evaluated for alignment with strategy, as well as their risk profile, business and customer impact, and other factors. An established work intake process will make it easier to adapt to changes and deliver business value faster.

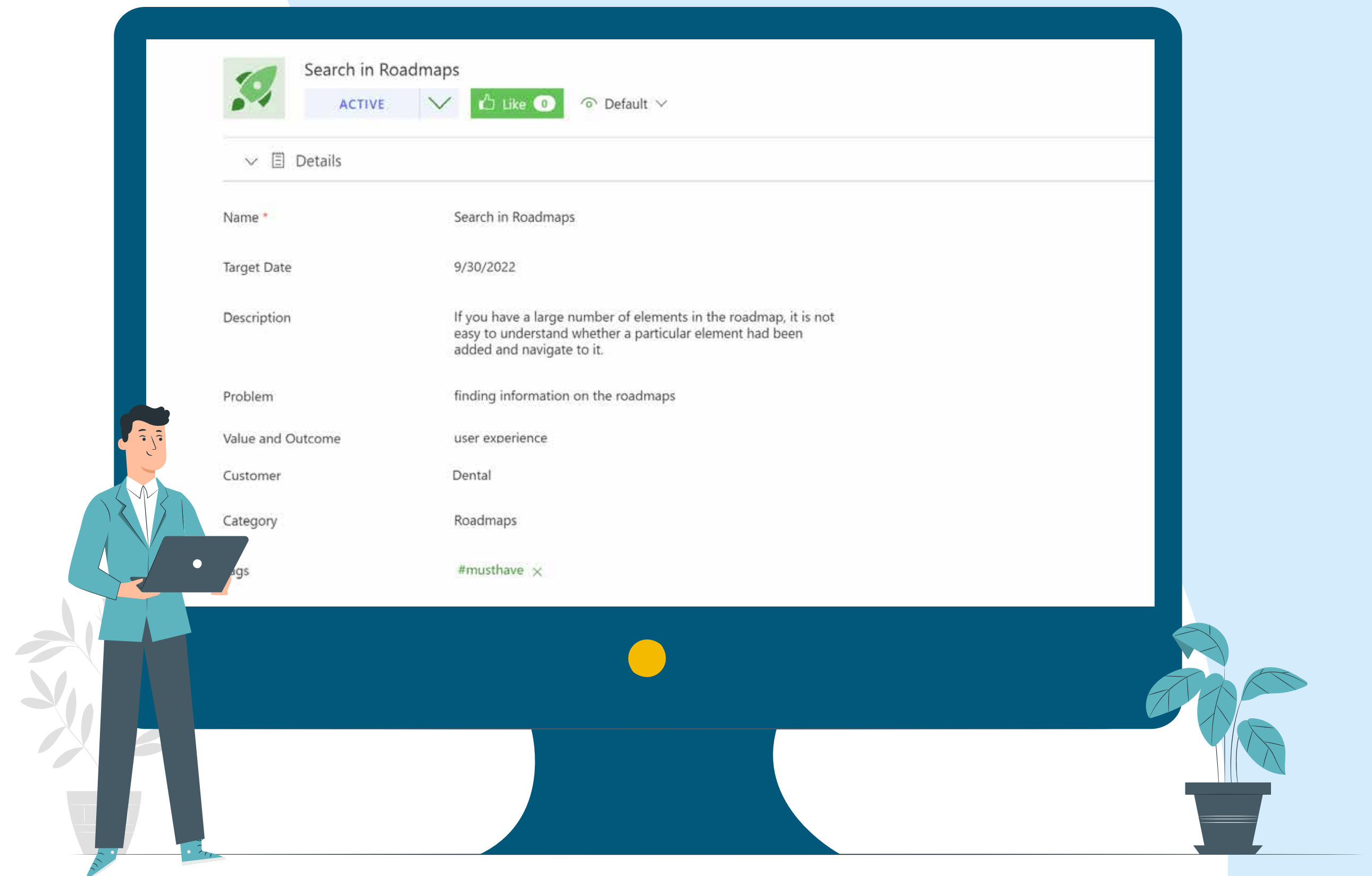
Capture ideas and requests

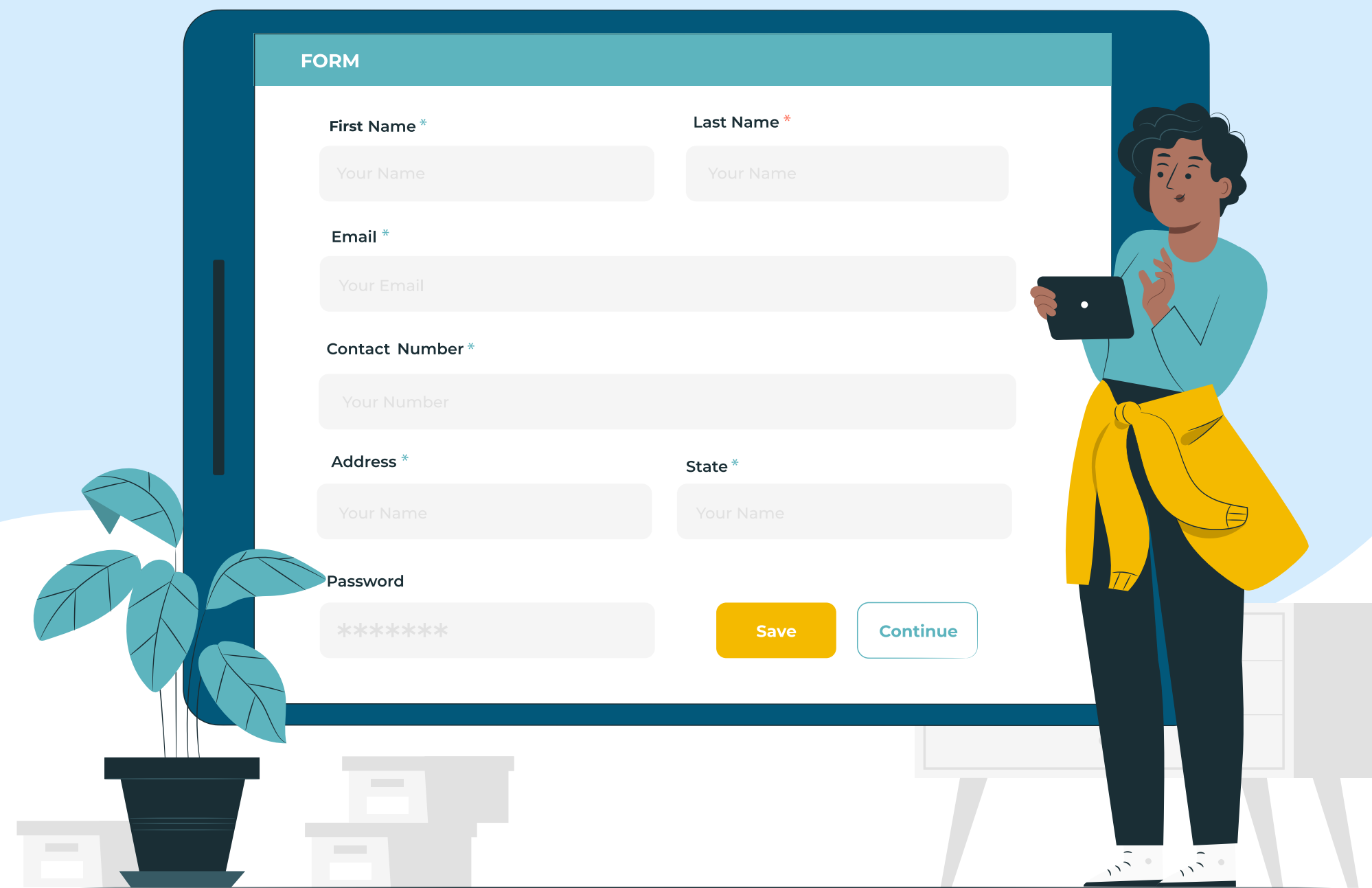
Everyone in your organization should be able to submit ideas and work requests freely, and in a way that is accessible to all.

Start by designing a simple **Work Intake Form**. Discuss fields and requirements with your team. Use tools that you already have in place.

To increase the chances of success with demand management and ideation, **start small and keep it simple** to increase uptake. Try to remove all possible friction.

It is important to streamline all intake, including change requests. Intake flows should capture and follow your organization's change control process for existing work.





Use what you have now

Organizations use various existing tools for customer interaction and employee collaboration. Many solutions have existing **"forms"** capabilities, and many organizations use these forms for collecting ideas and requests. **We suggest you reuse what you have.**

With PPM Express, you can collect requests and ideas using its Ideation module directly, or you can connect your existing system with the help of one of our connectors.



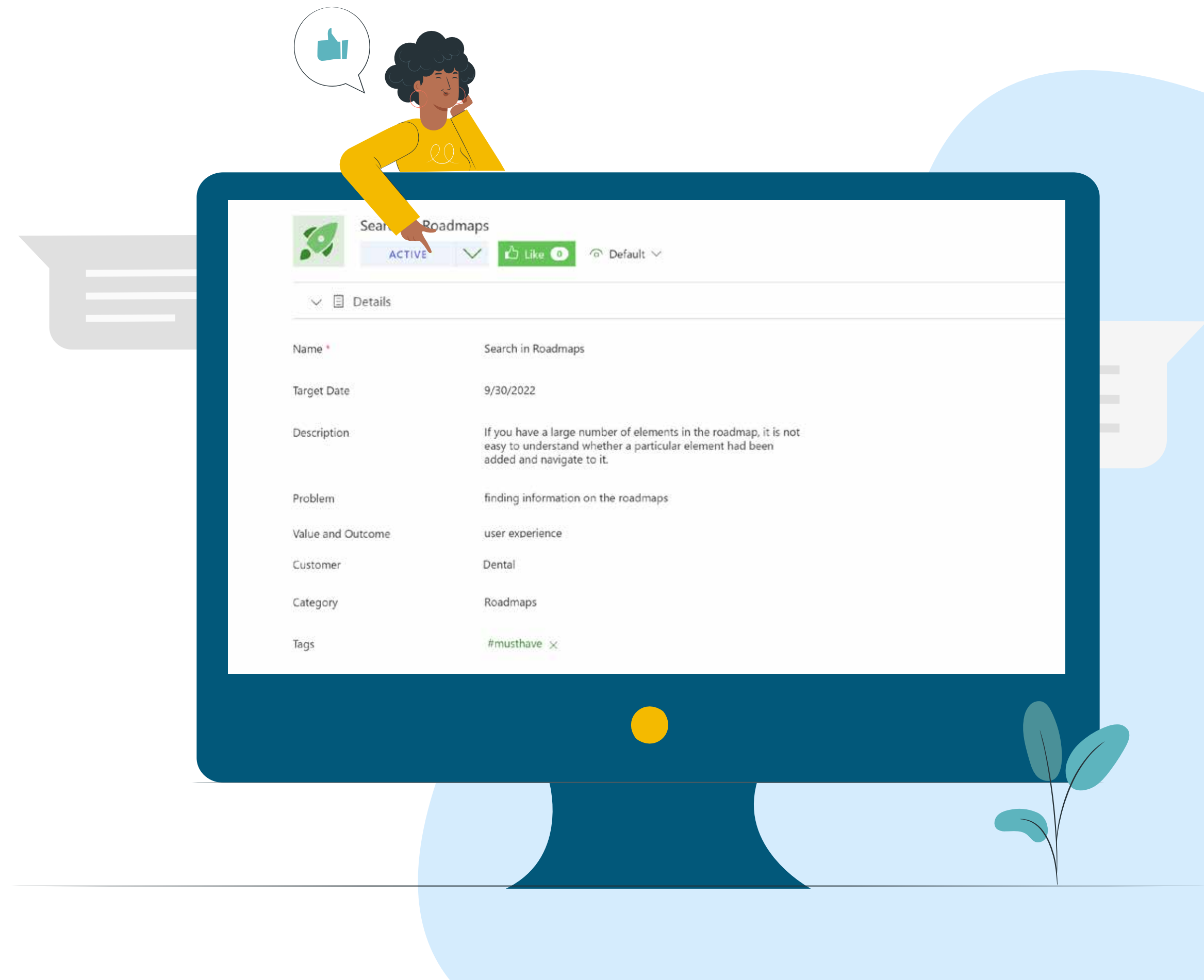
Power Automate

Every team member can submit ideas, and with the help of the **Power Automate** and **Zapier** connectors, requests will be automatically added to the PPM Express for Ideation.

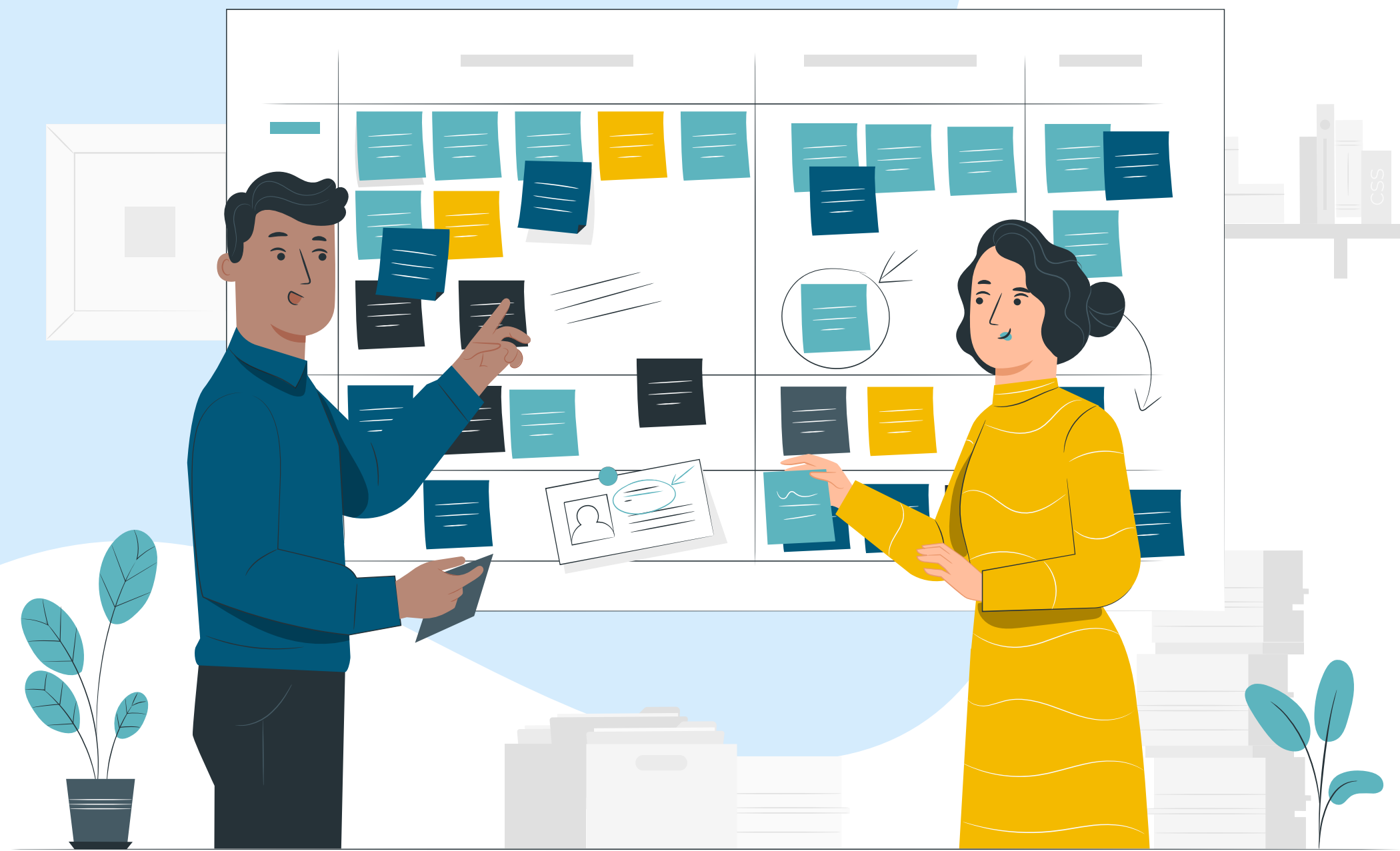
Capture customer feedback

Customer feedback is a frequently omitted component. Many of the customer requests will result in creating work elements. In this new economy, companies are becoming more **customer-centric** and **driven by customer feedback** and suggestions.

Customer feedback is no different from a new project request, change request, or a new feature idea from one of your employees. The only difference is that the product manager acts as an owner and customer representative/advocate.



Organizations can capture customer feedback using the unified Ideation and Innovation Framework from PPM Express. Organizations can collect feedback publicly or privately in dedicated ideation workspaces.



Not in your Backlog!

There is a great temptation to add ideas and requests directly to your **portfolio or product backlog** as new projects, feature requests, or user stories. This is not the right way to do it.

Organizations end up with large, unmanageable, outdated, hard-to-maintain backlogs that overload teams.

We recommend you follow the same process for all types of demand



ideas



new project
requests



customer
feedback



change
requests

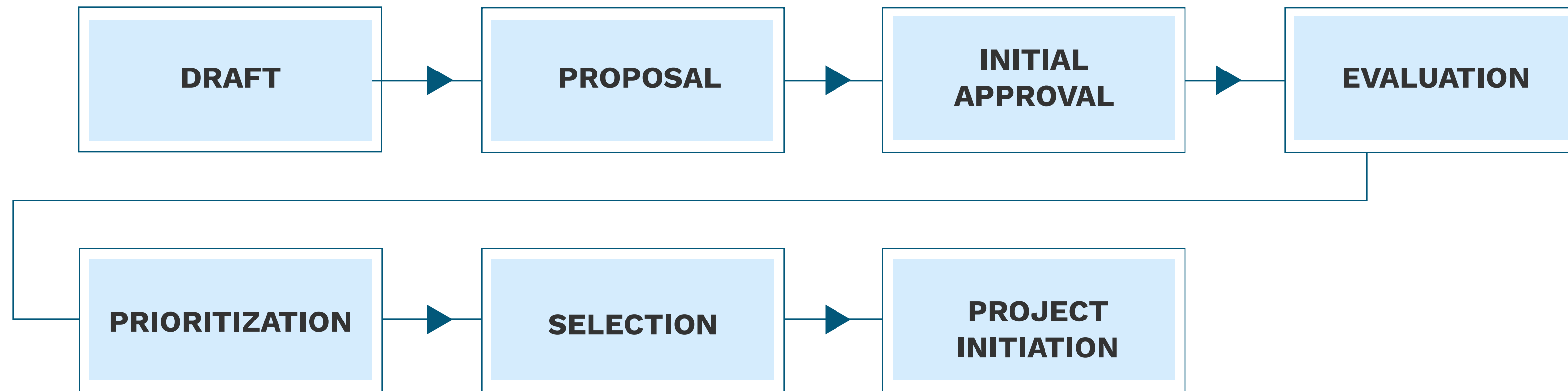
Segment Work Requests

You may use **different request forms** depending on how your organization works but use the same platform to track all types of demand.

Later you will be able to compare and analyze impact by using a **score, department, initiative, and other factors**. By using dashboards and reports from the reporting solution, you will be able quickly to compare and analyze work request types and results.



Let the Work Flow



Let the **Process Automation** handle the bulk of the work. You can use the system of approvals to collect and evaluate information.

This process can be simplified. Eliminate unnecessary work requests as quickly as possible, defer or put low-value work on hold, and progress high-impact work quickly.

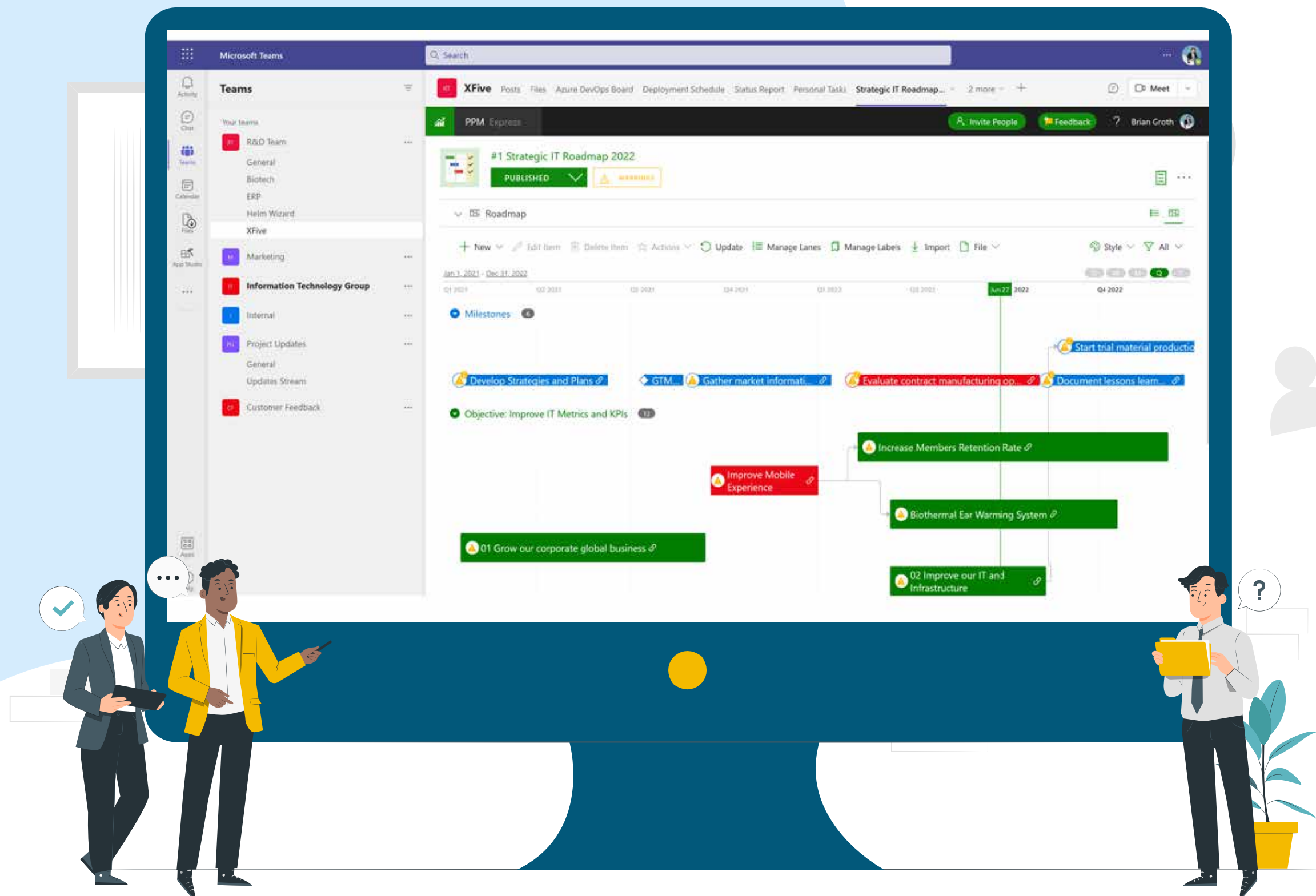
Automate the project intake process so that appropriate approvers are notified at the correct point. Ensure that the process flows smoothly with constant but appropriate notifications.

You will quickly see results and an **increase in business value** by creating a work intake and demand management system and implementing it throughout your business.



Collaborate with Teams

All communication related to ideas and work requests can be managed from one platform. The best outcome is when your ideation platform integrates with an existing collaboration platform, such as Microsoft Teams.



User votes, questions, discussions, notes and attachments, decisions, and action items collected throughout the workflow are part of the life cycle of the work request and should be tracked.

We recommend using **collaborative work management software (such as Microsoft Teams)** to facilitate communication, tracking, and completion of work.



Evaluate

Analyzing request or idea details, collecting resources, demand, and financial impact will help you determine which requests are most valuable and feasible for your organization.

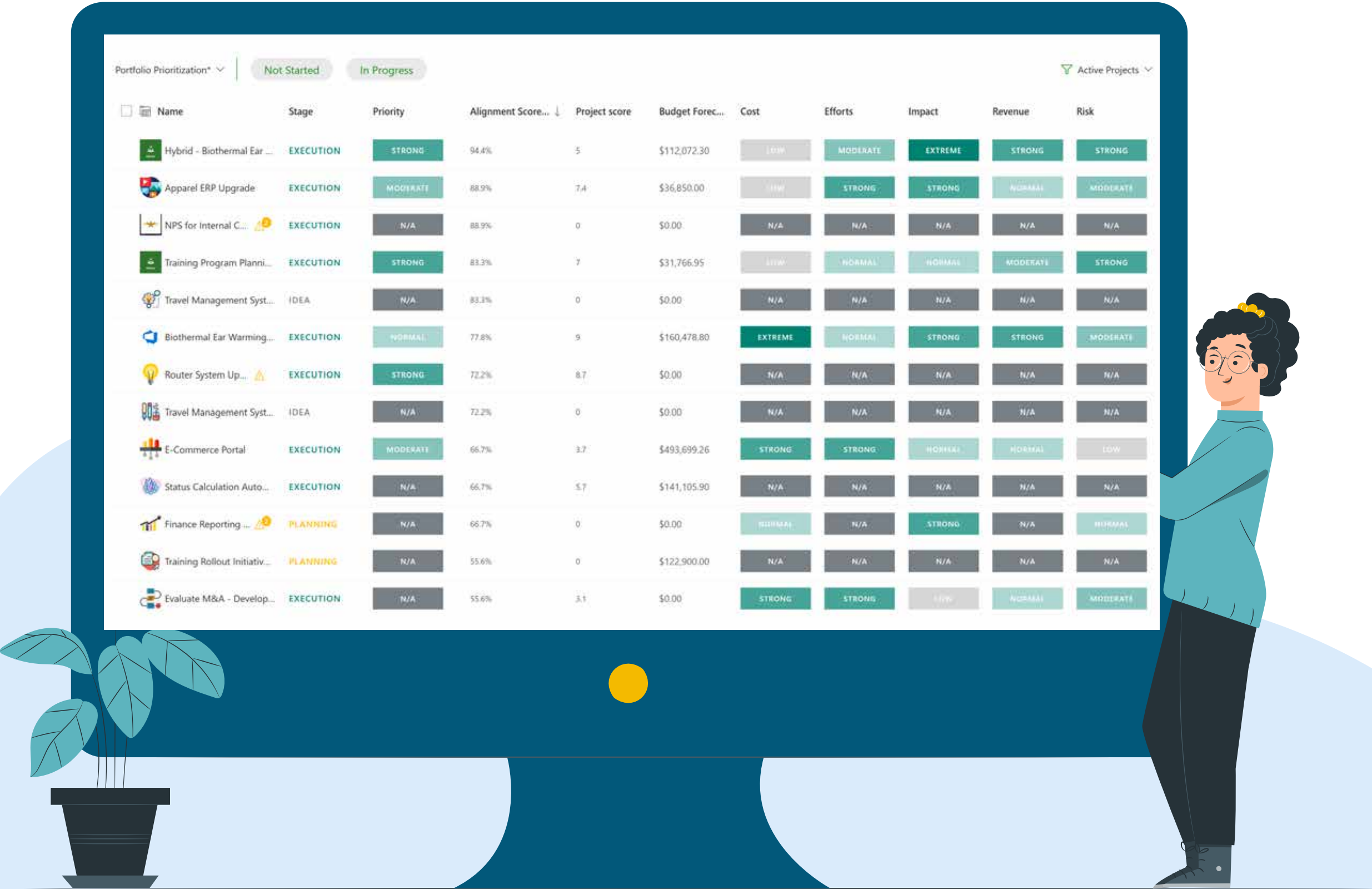
Organizations often categorize requests based on their overall value. This can be done either using a simple score calculation based on key data or using one of the prioritization frameworks or models. In addition, organizations can score ideas using strategic fit, risk level, cost, business value, and customer impact – these factors have relative importance. They can be used later during prioritization and selections

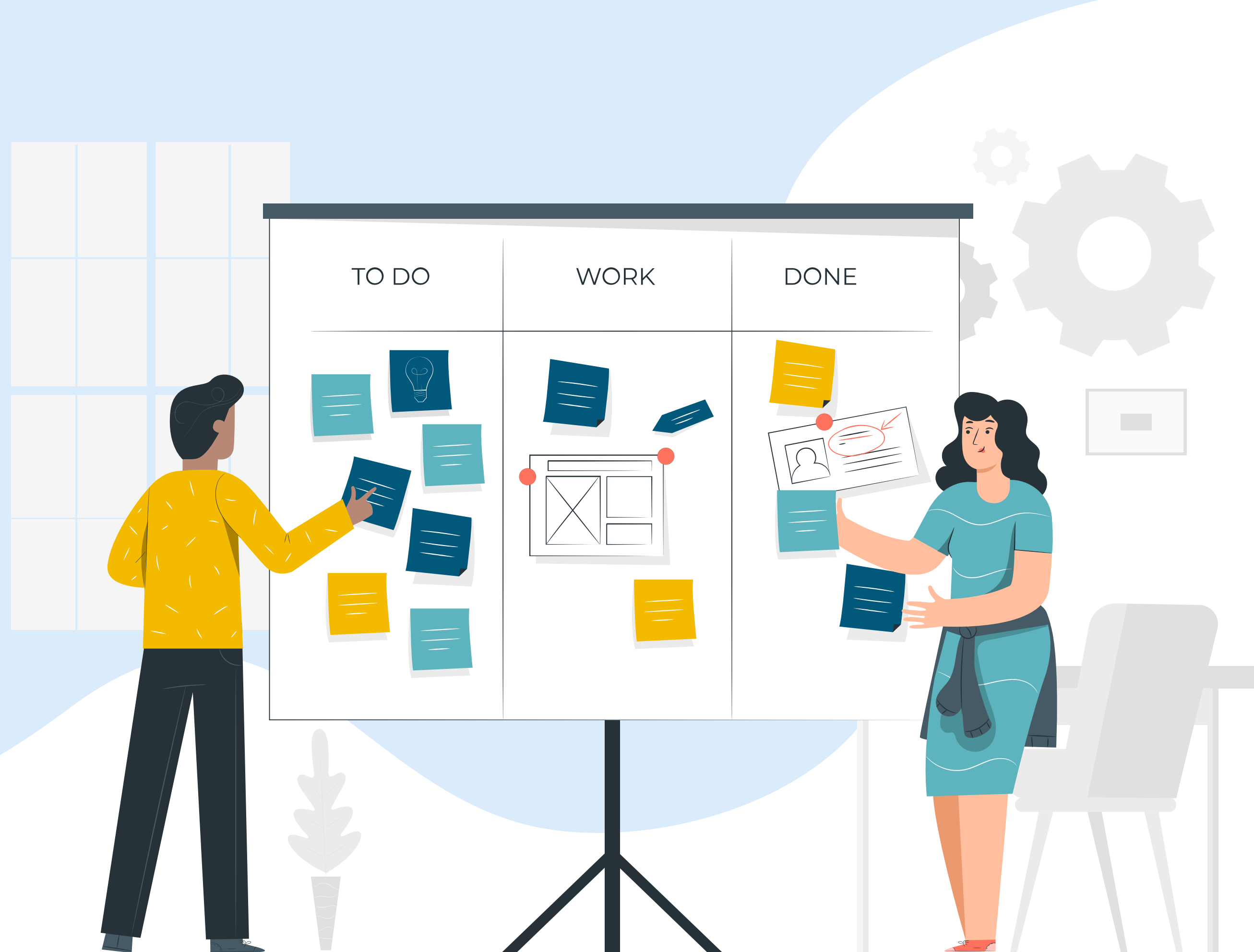
Prioritize

Prioritization is an essential step in the entire demand management and work intake process.

The goal is to select work, ideas, requests, and CRs that will **deliver the most value** and give an organization a competitive edge.

For organizations that use **continuous prioritization**, this is the first step in the Backlog Prioritization or Portfolio Prioritization process. At a later stage, selected work will have to be prioritized against work in progress.





Initiate

After the prioritization and selection of work, now it is time to create work in your PPM system – a new initiative, new project, new epic, or feature.

Now teams can start work on a detailed scope, schedule, cost and resource planning, and business impact evaluation to support the case during **Portfolio Prioritization**.

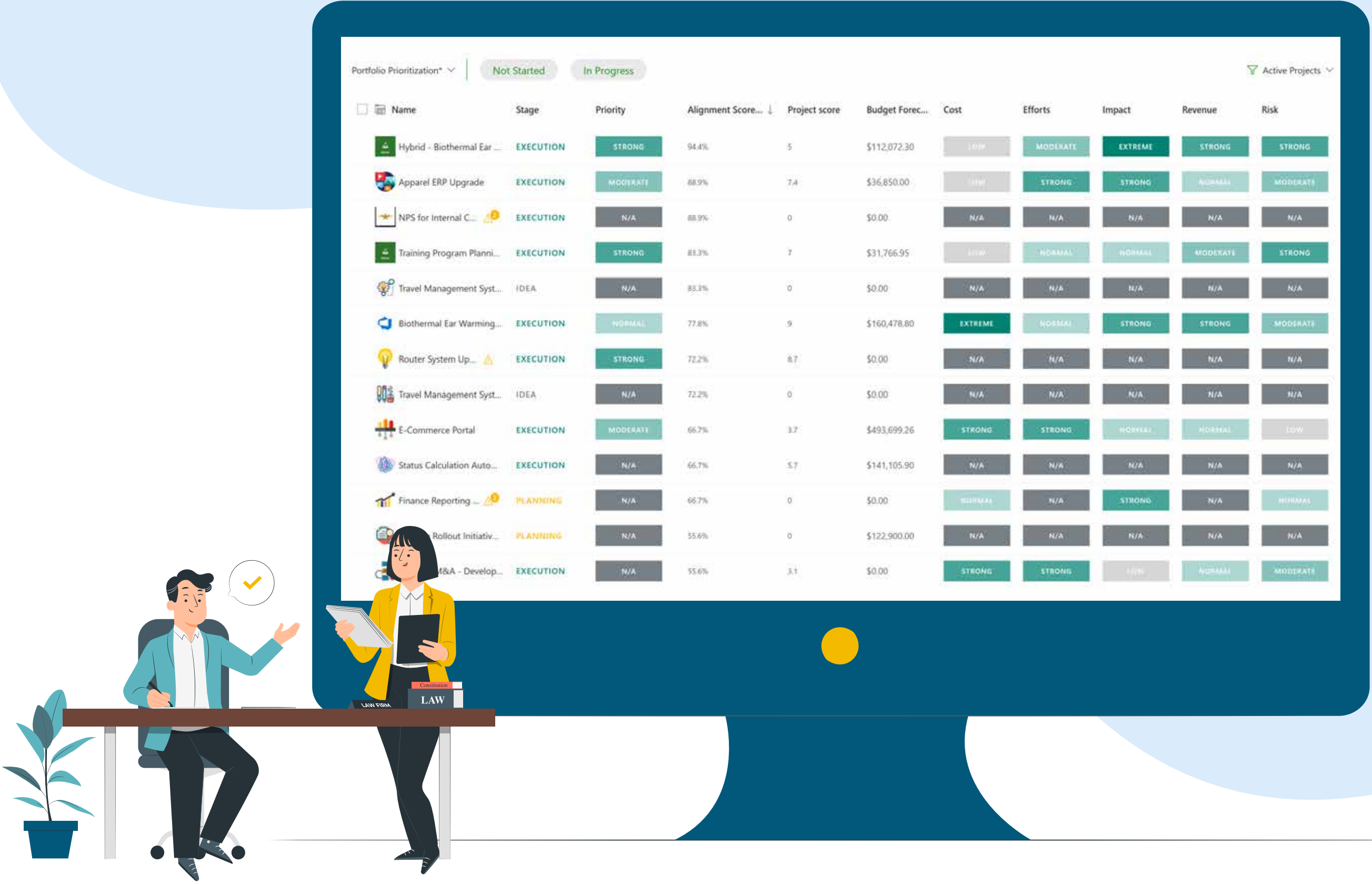
Prioritize Portfolios

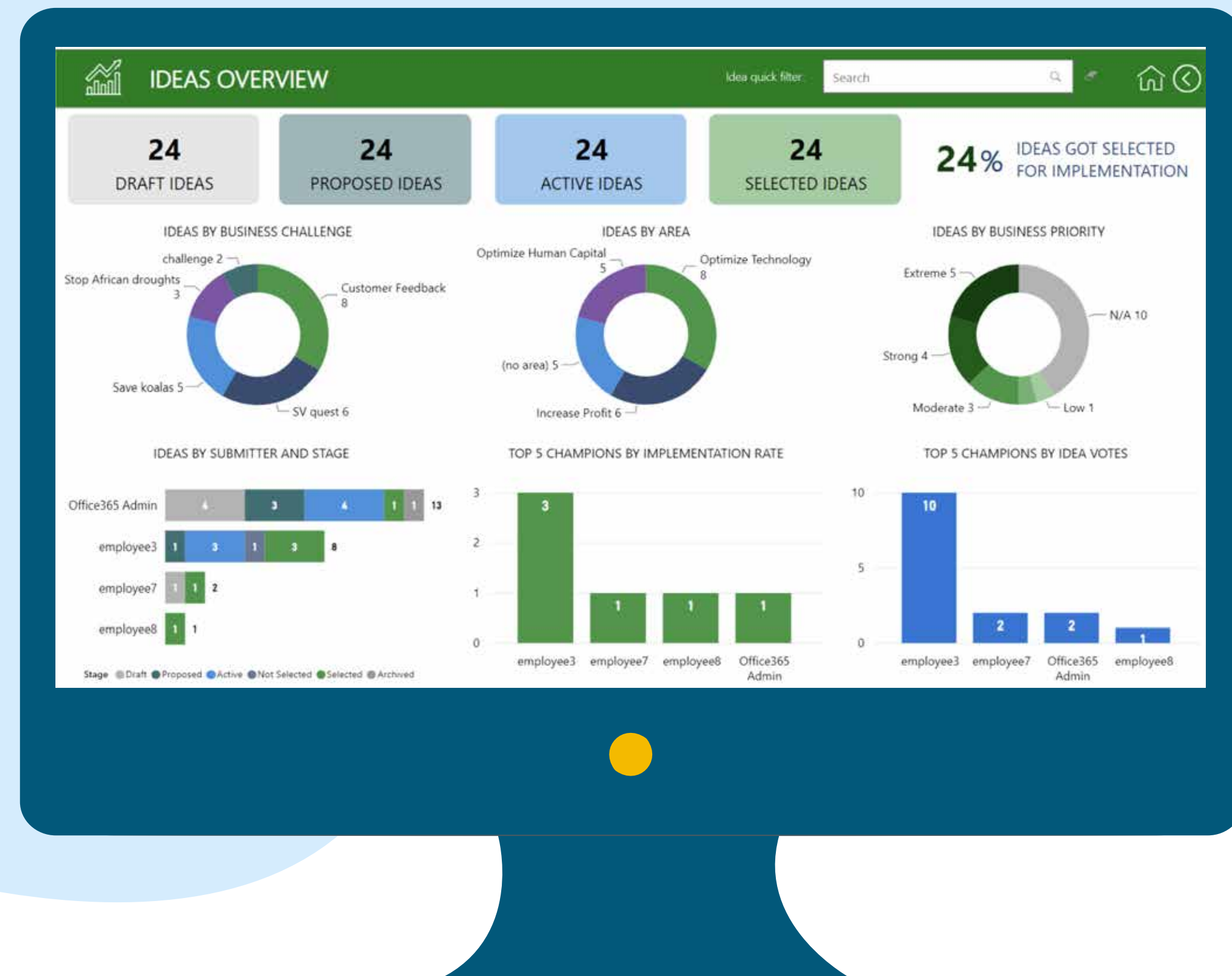
Prioritizing a portfolio of projects is about focus – where to allocate resources and when to begin the work. This allows the portfolio governance team to manage critical resource constraints and make best use of company resources.

High-priority projects require the most resources to finish the work on schedule and well. Multiple projects require that staff understands the best areas to concentrate their efforts.

Individuals must identify their relative priorities when faced with competing demands. This will ensure that resources are not being diverted from high-value work.

To ensure maximum value within the limitations, you must make sure your most important people work on the most critical projects.





Analyze and Audit, Improve

Continuous improvement is vital to demand management success. You can highlight your achievements, learn, and adapt to changing needs. You must assess how demand management and the work intake process (as well as the resulting work) performs operationally and financially. This will allow you to improve your organization and reach your strategic goals.



Manage Innovation with PPM Express

www.ppm.express

We invite you to start today by setting up your portfolios and discovering the innovation and ideation framework. Begin with this guide – **it is a great starting point and opportunity to change and advance.**

With over nine years of experience in Project Portfolio Management, the PPM Express team has gained knowledge and experience from working with hundreds of organizations. Take advantage of our insights – the best software on the market, best practices, multiple prioritization frameworks, and outstanding support – and transform your organization by connecting strategy with execution.

BONUS:

Demand Management Gameplan

| Action Items | Date |
|--|------|
| <input type="checkbox"/> Select Demand Management Software | |
| <input type="checkbox"/> Review existing intake form & process | |
| <input type="checkbox"/> Integrate existing forms into a single solution | |
| <input type="checkbox"/> Leverage collaboration software for ideation | |
| <input type="checkbox"/> Implement DM workflow | |
| <input type="checkbox"/> Enable notifications in the workflow | |
| <input type="checkbox"/> Collect Resource Demand for new work | |
| <input type="checkbox"/> Select Prioritization Criteria <div></div> <div></div> | |

| Action Items | Date |
|---|------|
| <input type="checkbox"/> Collect Financial Impact for new work | |
| <input type="checkbox"/> Collect Risk Profile for new work | |
| <input type="checkbox"/> Define Scoring / Prioritization Model | |
| <input type="checkbox"/> Implement Continuous Prioritization process | |
| <input type="checkbox"/> Prioritization Framework | |
| <input type="checkbox"/> Implement Reporting for Demand Management | |
| <input type="checkbox"/> Document Lessons Learned on Prioritization | |
| <input type="checkbox"/> Review and Analyze Demand Management Results | |