



# TEAMCENTER

## Initiative Planning

Teamcenter 2412

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# 1. Initiative Planning overview

## What is Initiative Planning?

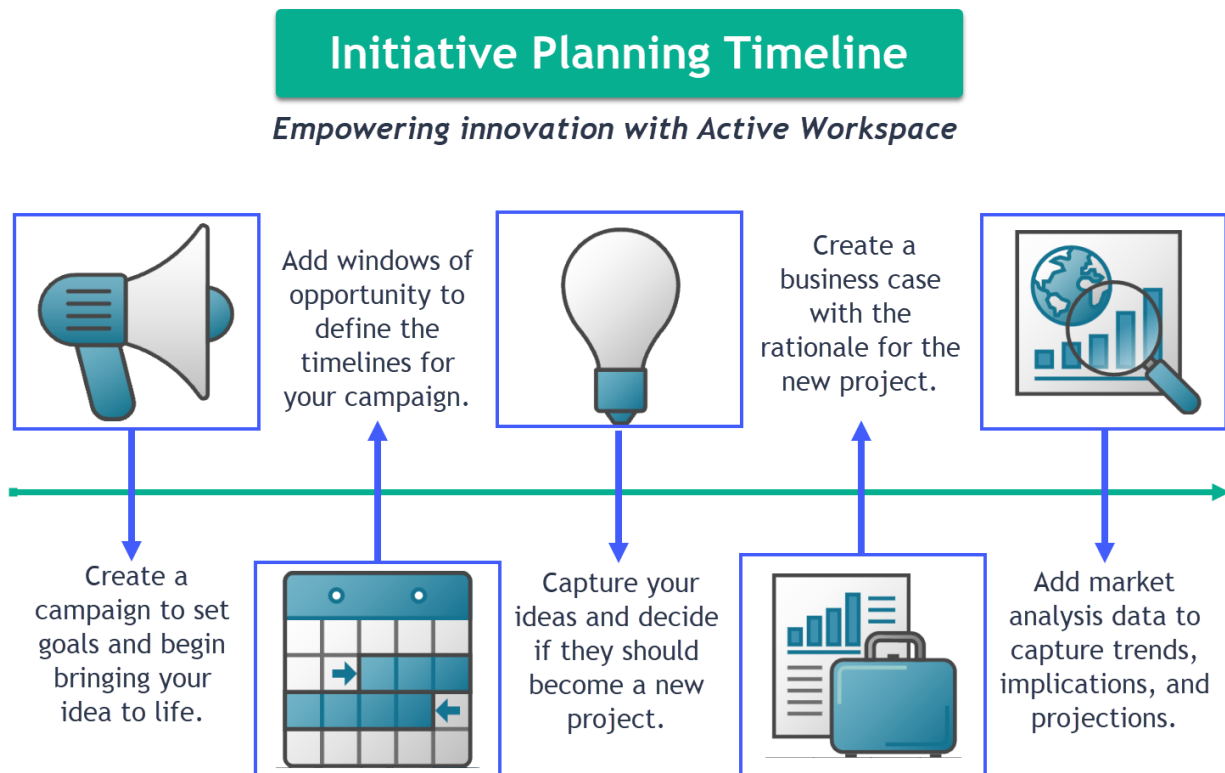
In the changing world of consumer products today, companies must innovate and execute initiatives quickly and adapt to digitalization.

Using Teamcenter Initiative Planning companies can:



- Orchestrate project requests with campaigns.
- Forward opportunities from research and development.
- Manage the lifecycle of ideas and other project requests.

Specifically, you can define, manage, and track the various stages of campaigning and ideation. This can begin from the summarization of an initiative to the acceptance of an idea that then leads to the start of a new project.

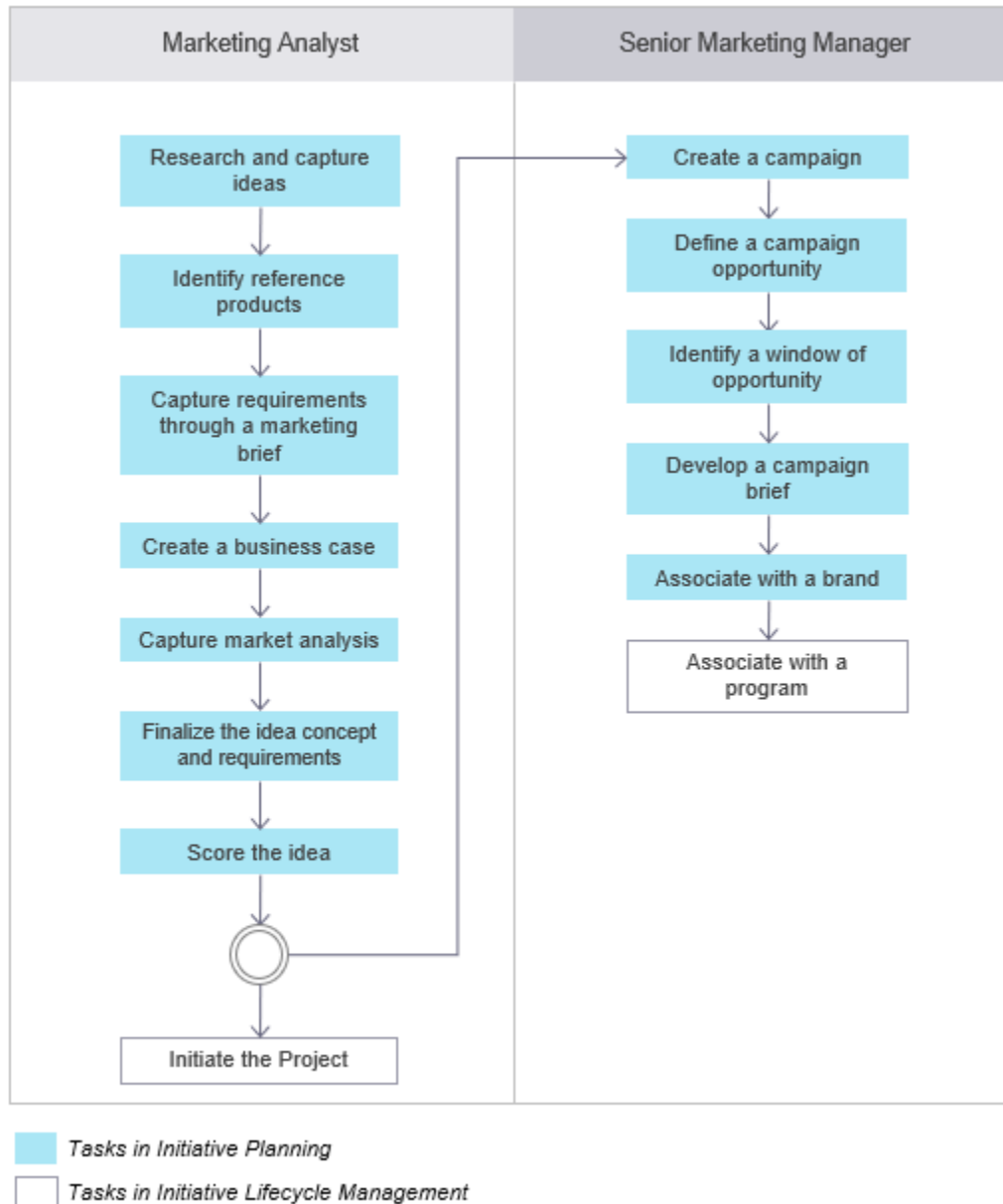
The graphic below shows the different stages of the Initiative Planning process that leads to the start of the new project.



## Where do I go from here?

 Administrator	
Install Active Workspace and Initiative Planning.	Refer to the following: <ul style="list-style-type: none"> <li>• Active Workspace installation on Windows and Linux.</li> <li>• Initiative Planning installation</li> </ul>
 Business User	
Get started with the basics of using Active Workspace.	Refer to Active Workspace Fundamentals.
Get familiar with the Active Workspace page layout.	See the section describing the page layouts.
Understand the Initiative Planning business process.	Start by learning about the subprocesses that make up the Initiative Planning business process.
Use the Initiative Planning solution.	Start with the campaign management overview.

## Understanding the Initiative Planning business process



With initiative planning, campaign owners have a way to manage campaigns along with products to ensure that the entire product, and program teams are working towards achieving the company objectives.

Consider the following scenario. A company that manufactures smoothies wants to make its products eco-friendly.

The marketing analyst Jen initiates the idea of using eco-friendly packaging for the smoothies. Jen attaches the research material that supports her idea as attachments, such as requirements to build eco-friendly products, and industry trends.

Jen associates the idea created as Eco-friendly packaging for smoothies with the Energizers brand, under reference product. She also captures a marketing brief that elaborates on the idea concept, the marketing requirements, and the claims. This brief is available for all the stakeholders to review.

Next, Jen creates a business case for the idea, where the product definition, financial goals, and technical goals are captured. These goals are available for all the stakeholders to review.

She also captures the records of a thorough market analysis, which enables the stakeholders to understand the trends and implications, customer profile, the competitive analysis, and demand analysis for the product, if this idea were to be realized.

Based on the research, the stakeholders score the idea, and this idea has a market score of 10. There are categories like strategic, revenue, and trends by which this idea can be scored. The scores range from a value of zero to ten, with zero being the lowest and ten being the highest.

In the next phase of innovation management, Ryan, a senior marketing manager, initiates a Sustainable digital enterprise campaign to modify product lines. He identifies the campaign details such as the goals, the tools, resources, budget estimates, and the targeted consumers. He associates the idea Eco-friendly packaging for smoothies with the campaign Sustainable digital enterprise, to ensure that the idea is realised through this campaign.



Ryan captures the potential opportunity of consumers preferring eco-friendly packaged products as a campaign opportunity. As this campaign has high probability of succeeding, the stakeholders score the campaign with a probability of 80% and opportunity score 3.2 out of 5.




Ryan identifies a window of opportunity, that launching this campaign on the world environment day would contribute to the success of the campaign.

He also creates a campaign brief, which captures the key campaign messages, and strategies.

Finally, Ryan links the campaign to the Energizers brand to ensure that the brand owner and stakeholders support the campaign and the targeted windows of opportunities.

## Initiative Planning terms in Teamcenter

Object	Description
 Campaign	Captures information in an organized manner to achieve the goal over an extended period.
 Idea	Captures the thought or concept that could eventually pave the way for a project or product request.

Object	Description
 Window of Opportunity	Identifies a period created in the context of a campaign or market analysis during which some action can be taken that will achieve a desired outcome.
 Business Case	Captures the reasoning for initiating the project and includes assumptions, constraints, and product potential.
 Market Analysis	Captures the trends, implications, customer profile, competitive analysis, and projections.



# 2. Installing and Administering Initiative Planning

## Installation and prerequisites

To install Initiative Planning, select the following applications:

- Teamcenter
  - Active Workspace
    - Initiative Planning Active Workspace
- Foundation
  - Initiative Planning

Note:

Refer to Price book for prerequisite products.

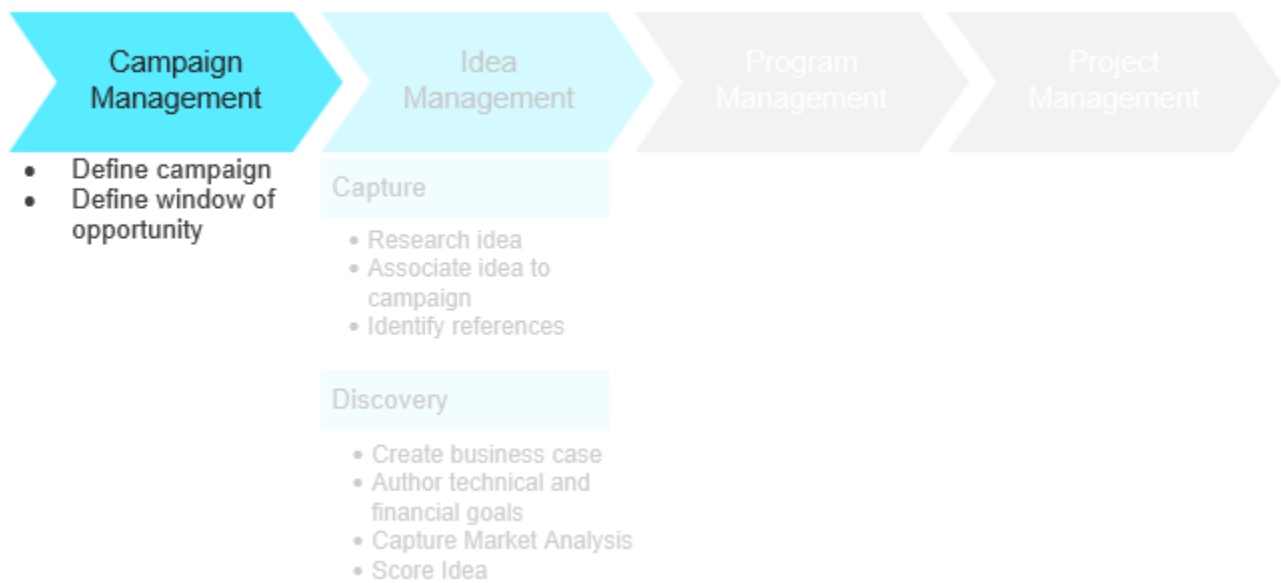


# 3. Using Initiative Planning

## Campaign management

### Campaign management overview

Similar to how a program orchestrates projects, the campaign orchestrates ideas and provides information about the audience and goals of the campaign. It also includes a high-level description of planned resources and the budget and can identify one or multiple windows of opportunity that act as a reference for the windows of opportunity targeted by the ideas.



### Create a campaign

In Teamcenter, a campaign is the core object used to orchestrate and relate ideas, product requests, audiences, and windows of opportunity. It is also used to set goals, allocate resources, and describe the requirements, budget, and planned resources.

#### Procedure

1. Click **Folders**.
2. In the **Folders Overview** panel, click **More commands** **...** > **New** **⌘** > **Add** **⊕**.
3. In the **Add** panel, select **Campaign** from the list of types. Use the **Filter** box to find this type if it is not shown by default.

4. Enter a name, fill in any of the remaining optional properties, and then click **Add**.

## Define a campaign opportunity

A campaign opportunity captures potential opportunities such as consumers increasingly preferring eco-friendly products. The campaign opportunity is scored, and this indicates the campaign's probability of succeeding.

### Procedure

1. Open the campaign.
2. Click the **Opportunities** tab.
3. In the **Campaign Opportunities** section, click **Add** ⊕.
4. Select the appropriate type suitable to the campaign opportunity you wish to add.
5. Enter the **ID** value, **Name**, **Target Date**, and other required information.
6. Click **Add**.

## Define a window of opportunity

A window of opportunity captures the time during which the action is expected to happen to provide the best chance for a desired result. Multiple windows of opportunity with differing timelines can be used to capture various phases of the campaign to help realize the final goal of the campaign.

Create a window of opportunity as follows:

1. Open the campaign.
2. From the **Overview** tab, in the **WINDOW OF OPPORTUNITY** section, click **Add** ⊕.
3. In the **Add** panel, enter a name, define a start and an end date, and then click **Add**.

A window of opportunity is created, related to the campaign, and listed in the **WINDOW OF OPPORTUNITY** table.

When a campaign is related to a program, its windows of opportunity can be viewed on the program timeline.

## Create a campaign brief

A campaign brief captures the key insights from the campaign such as the overall goals, target audience, key campaign messages, and campaign strategies.

### Procedure

1. Open the campaign.
2. Click the **Campaign Briefs** tab.
3. In the **Campaign Briefs** section, click **Add** ⊕.
4. Select the type relevant to the campaign brief.
5. Enter the **ID** value, **Revision** number, **Name**, and other required information.
6. Click **Add**.

## Associate the campaign to a brand

A campaign is associated with a brand, so that the brand owner and the stakeholders are updated on and support the campaign and the targeted window of opportunities.

### Procedure

1. Open the brand equity.
2. Click the **Campaigns** tab.
3. In the **Campaigns** section, click **Add** ⊕.
4. In the **Add** panel, select **Search**, and search for the campaign by name.
5. Select the required campaign from the list and click **Add**.

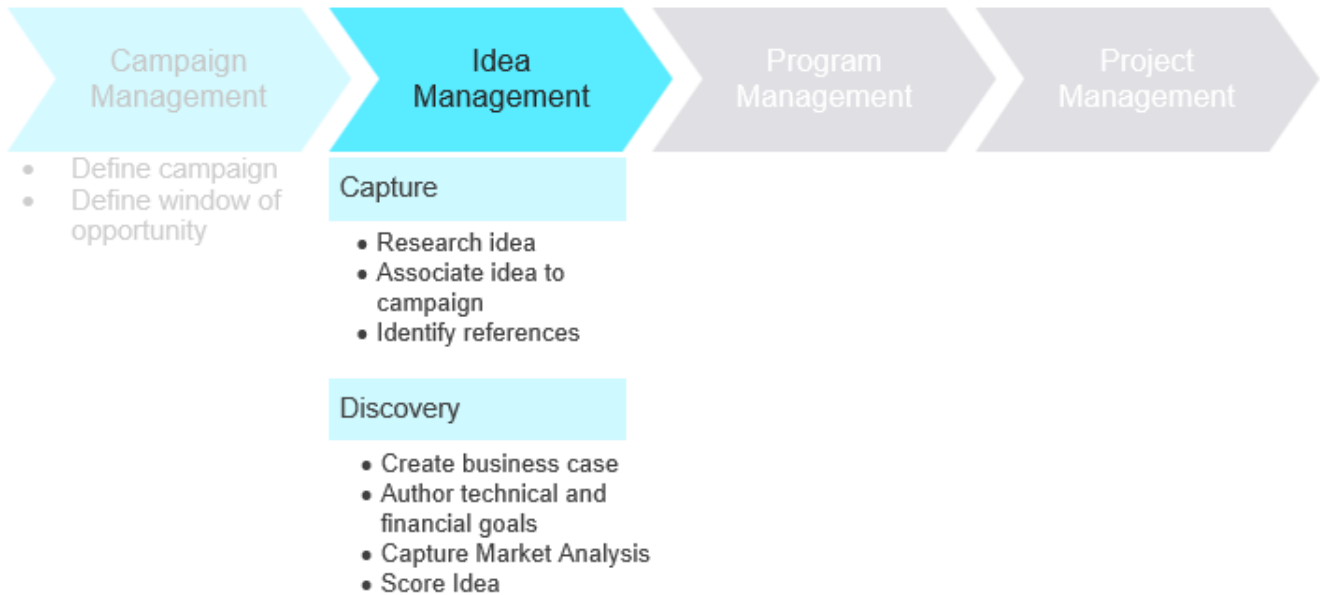
The selected campaign gets associated with the brand equity.

## Idea management

### Idea management overview

Idea management includes the capture and rationalization of a project request. Ideas are researched during the *capture* phase and are used during the *discovery* phase to define a product, set goals and

objectives, identify trends, record customer profiles, and make projections. An accepted idea results in the start of a new project.



## The capture phase

### Research and capture idea

In Teamcenter, an idea is a project request that manages the business process, eventually resulting in the acceptance of the idea and the start of a new project.

Create an idea as follows:

1. On the home page, click **Folders**.
2. In the **Folders Overview** panel, click **More commands** **...** > **New** ✨ > **Add** ⊕.
3. In the **Add** panel, select **Idea** from the list of types. Use the **Filter** box to find this type if it is not shown by default.
4. Enter a name, category, and source, and fill in any of the remaining optional properties.

Selecting a **Category** and **Source** is important as it has a downstream effect. These values are used to filter the list of templates from which to choose when creating a plan for the idea.

5. Click **Add** to create the idea.

Alternatively, if a relevant campaign already exists, you can create an idea in context of that campaign.

1. Open the campaign.
2. From the **Overview** tab, in the **IDEAS** section, click **Add** ⊕.
3. In the **Add** panel, enter a name, category, and source, and fill in any of the remaining optional properties.

Selecting a **Category** and **Source** is important as it has a downstream effect. These values are used to filter the list of templates in subsequent stages of the process.

4. Click **Add**.

An Idea is created, related to the open campaign, and is listed in the **IDEAS** table.

## Identify references

You can identify references for an idea, such as existing products, brands, or stock keeping units (SKUs), that share similar characteristics and may help facilitate the ideation process.

Identify references as follows:

1. Open the idea.
2. From the **Overview** tab, in the **REFERENCE PRODUCT OR BRAND** section, click **Add** ⊕.
3. In the **Add** panel, click the **Search** tab and search for the existing product, brand, or other item to be associated.
4. Select the appropriate item and click **Add**.

The selected item gets associated with the open idea and is listed in the **REFERENCE PRODUCT OR BRAND** table.

## Create a marketing brief

A marketing brief elaborates on idea concept, marketing requirements, and claims associated with the idea.

### Procedure

1. Open the idea.
2. Click the **Marketing Briefs** tab.
3. In the **Marketing Briefs** section, click **Add** ⊕.

4. In the **Add** panel, select the relevant type.
5. Enter the **ID** value, **Revision** number, **Name**, and other required information.
6. Click **Add**.

## The discovery phase

### Create a business case

A business case captures the reasoning for initiating a project or task. It defines the product type, concept, and differentiators, contains assumptions and constraints, and describes product potential.

You create a business case in the context of an idea as follows:

1. Open the idea.
2. From the **Overview** tab, in the **BUSINESS CASE** section, click **Add** ⊕.
3. In the **Add** panel, enter a name and fill in any of the remaining optional properties such as product type, assumptions, and constraints.
4. Click **Add**.

A business case is created, related to the open idea, and is listed in the **BUSINESS CASE** table.

Note:

A business case can be created in the context of a project or independent of a project from the **HOME** folder.

### Author financial and technical goals for business case

A business case captures information describing financial and technical goals. The financial goals document captures what the project will contribute to the shareholder value and the financial success of the business. The technical goals document captures the technical objectives to be addressed by the project.

Add financial and technical goals as follows:


1. Open the business case.
2. From the **Overview** tab, in the **GOALS AND OBJECTIVES** section, click **Add** ⊕.
3. In the **Add** panel, create items for **Financial Goals** and **Technical Goals** or search for existing items.

A new financial or technical goals item is created, related to the open business case, and is listed in the **GOALS AND OBJECTIVES** table.

## Capture market analysis

A market analysis captures the trends, implications, customer profile, competitive analysis, and projections.

Create a market analysis item in the context of an idea as follows:

1. Open the idea.
2. From the **Overview** tab, in the **MARKET ANALYSIS** section, click **Add** .
3. In the **Add** panel, enter a name and fill in any of the remaining optional properties, such as addressed regions and markets and market size.
4. Click **Add**.

Market analysis item is created, related to the open item, and is listed in the **MARKET ANALYSIS** table.






Note:

A market analysis item can also be created on its own from the **HOME** folder.

## Score an idea

To prioritize ideas, each idea is assigned a score.

Score an idea in Teamcenter as follows:

1. Open the idea.
2. From the **Overview** tab, click **More commands**  > **Edit**  > **Start Edit**.
3. In the **SCORE** section, click **Add** .
4. In the **SCORE** table, select a number from one to ten to prioritize the idea.
5. Choose **Edit**  → **Save Edits** .

The idea score is saved.

#### Associate an idea with a campaign

When an idea is created outside the context of a campaign, you can associate it with a campaign later.

Associate an idea with a campaign as follows:

1. Open the campaign.
2. In the **Overview** tab, click **Add** ⊕ in the **IDEAS** section.
3. In the **Add** panel, click the **Search** tab and search for the idea to be associated with the campaign.
4. Select the idea and click **Add**.

The selected idea is associated with the campaign and is listed in the **IDEAS** table.