

This is an excerpt from an SOP.

6. Prioritize Project

6.1. Process Overview

This section outlines the manner in which projects get prioritized within Customer Management. A project customer and sponsor must be identified prior to prioritizing a project.

6.2. Roles

- 6.2.1. Portfolio Office Manager
- 6.2.2. Portfolio Office Coordinator
- 6.2.3. Project Governance Committee participant
- 6.2.4. Customer Management SVP
- 6.2.5. General Contractor
- 6.2.6. Resource Manager

6.3. Inputs / Pre-conditions

- 6.3.1. Business Case completed and submitted to the Portfolio Office (PO)
- 6.3.2. Project customer and sponsor identified

6.4. Process Steps

- 6.4.1. Once the Business Case has been received in the '[New Capabilities](#)' email box, the PO Coordinator loads it to Knowledgelink.
- 6.4.2. The PO Coordinator updates the Project Portfolio to include the business case as a 'New Project'.
- 6.4.3. The PO Coordinator loads the updated portfolio back into Knowledgelink and distributes to all stakeholders.
- 6.4.4. The Project Governance Committee reviews and prioritizes 'New Projects' once per month.
- 6.4.5. Projects are classified as one of the following types: Must Do, Important to the Business, Nice to Have.

Process Steps, *continued*

- 6.4.6. After prioritization, a representative from the Project Governance Committee sends the prioritized portfolio to the PO.
- 6.4.7. The PO Coordinator loads the prioritized portfolio to KnowledgeLink and distributes it to all necessary stakeholders, including the Resource Managers.
- 6.4.8. Once per quarter, the General Contractors (GCs) conduct a Project Portfolio Review with the SVP of Upmarket Customer Management and the SVP of Mainstreet Customer Management.
- 6.4.9. Each SVP is accountable for reviewing the portfolio and providing formal signoff to their respective General Contractor (GC).

6.5. Outputs

- 6.5.1. Prioritized Project Portfolio
- 6.5.2. Formal SVP Portfolio Review & Signoff once per quarter

6.6. Timing

- 6.6.1. Frequency
 - 6.6.1.1. The Project Portfolio must be prioritized once per month.
 - 6.6.1.2. Review and formal signoff of the Project Portfolio must occur quarterly.
- 6.6.2. Cycle Time: the time required to prioritize will vary depending upon the number of requests in queue and the level of buy-in.

6.7. Notes