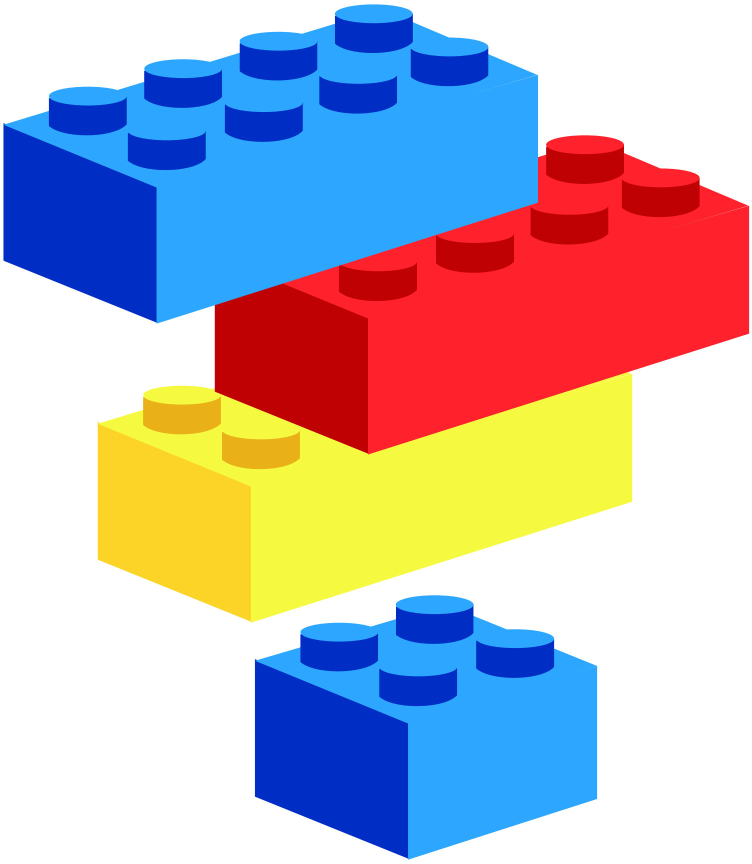
GETTING STARTED WITH TRANSPARENTCHOICE

transparent choice

Welcome to the future of decision making



watch

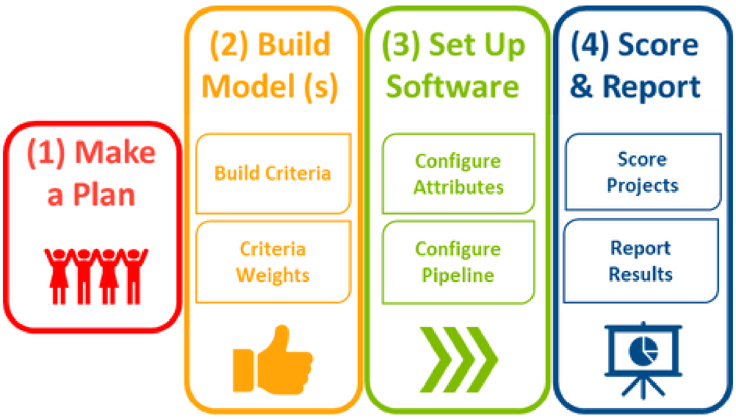
download

watch the video, download the template, get building

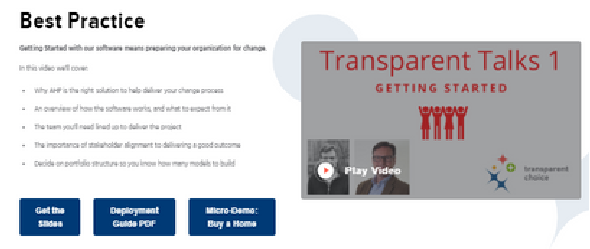
HELP PAGES

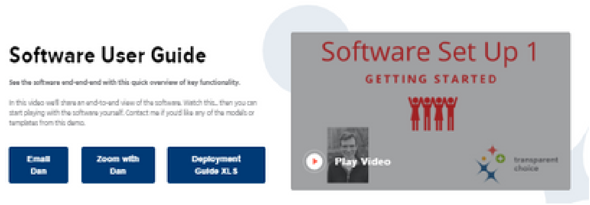
Jump onto our Help pages for slides, videos & best practice

follow the same flow as this deployment guide



watch our videos or download slide decks





Make a Plan
Build Criteria
Criteria Weights
Configure Attributes
Configure Pipeline
Score Projects
Report Results

click on the page you need

*Listen to **Best Practice** video for tips on how to drive great results (ideal as audio on a nice walk)*

*Watch **Software User Guide** for a click x click step through the software (best done with the software open in front of you)*

we recommend *listening* to Best Practice videos as homework, then *watching* Make a Plan Software User Guide to help get you started. After watch the Software Set up modules as you work through each stage

CORE TEAM

Identify the day-to-day team

DECISION SCIENCE FACILITATOR

Bringing AHP to life for your organization this role will help craft criteria, structure the decision and manage real-time voting.

Ideally external

SOFTWARE SUPER USER

This is the real 'hands-on' hero, who'll need to learn all our tricks to get your data into our software.

Ideally internal

PROJECT LEAD

This is the change agent in your organisation whose mission it is to embed the process for how the software is used.

Ideally internal

EXECUTIVE SPONSOR

Successful deployment relies on strong visible leadership. Being involved in key meetings will make a big difference.

speak with us if you'd like to connect with one of our recommended partners for external support

EXTENDED TEAM

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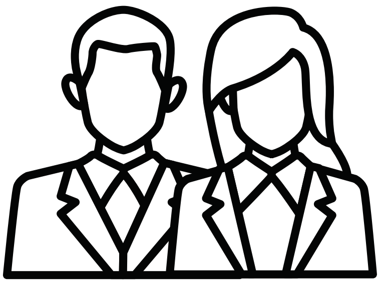
Identify the broader group to involve



EXECUTIVE STAKEHOLDERS

Getting your leaders involved in shaping & scoring criteria is important. Should be just a few hours required.

SUBJECT MATTER EXPERTS

SME's are your engineers, marketeers, sales people etc. Get them to score their areas of knowledge, using targeting to make the best use of their time.

EVERYONE ELSE!

From the people who allocate the budget to the folks who do the work... make your decisions transparent and inclusive. All Hands updates are ideal.

get milestone meetings into the diary early to give your deployment velocity

4-STEP PROCESS

Plan your deployment

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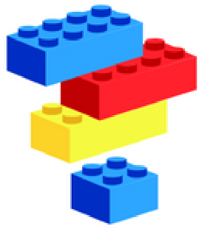
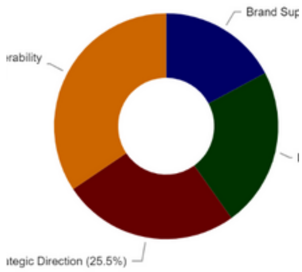


MAKE A PLAN

Build awareness for AHP, alignment around the need to change, and decide on your portfolio buckets.

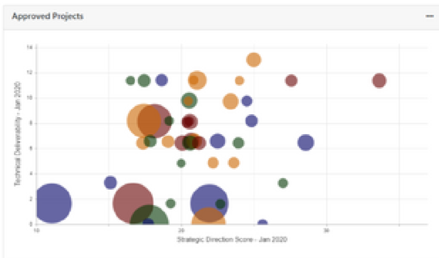


BUILD MODEL (S)

Engage with your leadership team to turn your strategy into weighted criteria.

SET-UP SOFTWARE

Configure software to collect data, define decision process & target scoring surveys.



SCORE & REPORT

Collect data, then feed results into reports. Use these Reports to build your portfolio.

learn what you need to do at each step & find out where key milestones are...

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MAKE A PLAN

Build awareness for AHP, alignment around the need to change, and structure portfolio

Make a Plan	Build internal alignment	Be the internal cheerleader for change - get people excited about working together to unlock HUGE benefits. Pom Poms Optional.
	Strategic Review - identify your starting point	Identify 'how things work round here'. Run through 3 P's. Compile existing strategy docs. Identify what went wrong with your last planning process.
	Split your Portfolio up into buckets	How are you going to prioritize? 1 big bucket, or multiple smaller ones with different criteria?
	Get the team together	Identify who to involve: from the Super User to the Execs. Make sure they're ready for what comes next.
	Build a plan	Use Deployment Guide to help build your own plan. Knit together diaries, deadlines and bandwidth to set yourself up to win.
	Get training	Go to Client Hub for videos and guides & book training meetings for zoom based support sessions. Start your journey to Jedi prioritizer.

See more materials here on Client Hub

Make a Plan

delivering value means delivering change - for that you'll need alignment & velocity

BUILD MODEL (S)

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Engage with your leadership team to turn your strategy into weighted criteria

	Step	Description
Build Criteria	Sign-off portfolio strategy	Make sure the goalposts are in place. Determine the nos of AHP models & their high level goals.
	Use current review documents as a base for drafting criteria.	Look at current portfolio for 'pros & cons' review. Compile existing strategy docs / scorecards for high level company goals.
	Deep Dive AHP Best Practice	Does the '5 bucket model' apply? What is a Criteria vs. Not a Criteria? Check criteria for common mistakes to avoid pitfalls.
	Build Criteria in Software	Load in draft Criteria - final sign off will be after measurements are added + pairwise checked.
	Add Measurement Scales	Use Measurement page to add scales (NB these will generate Attributes automatically). Consulting SMEs can be useful.
Criteria Weights	Final Sign-Off for Criteria + Scales	The AHP model is now fixed - changing beyond this point will involve repeating steps below.
	Load People & mail out links	Load data into People section, then mail our Pairwise Survey to Execs. Support with Respondents Guide (available on the "i" button in the survey).
	Meet to Review - real time alignment	Prepare by checking disagreements. Get people together, Set Opinion Panel to Meeting Mode, and use Real Time Voting to align.
	Publish Weights & Weighted score	Save final Weight set. Share data vizualisation. Create Weighted Score so Value Score is automated.
	Create Scenarios (OPTIONAL)	Create alternative Weight Set for different scenarios if required.

See more materials here on Client Hub

Build Criteria **Criteria Weights**

managing diaries is key, as having time to build criteria with your leadership is invaluable

SET-UP SOFTWARE (1)

Set up Attributes to enable data collection for your model

	Step	Description
Configure Attributes	Getting Started with Data	Work out the data you need, and where you will get it. Use Excel Toolkit to capture plan & make it easy to map into software.
	Attribute Uses (1) Core Data	Add Name and Description - they are built into the software as Attributes.
	Attribute Uses (2) Enrich Description (OPTIONAL)	Add a more extensive Project Description (e.g. Benefits Case), a link to a URL, an image or even a video so Respondents know what a Project is all about.
	Attribute Uses (3) Criteria	Follow AHP best practice in defining scales for Qualitative criteria & MIN-MAX levels for Quantitative criteria.
	Attribute Uses (4) Resource	Defined as either money or people. Collection can be via single source of data OR panel of SMEs.
	Attribute Uses (5) Reporting Hierarchy (OPTIONAL)	Split Reports or Assessments into buckets by tagging projects against (for example) department. Multiple tags supported.
	Attribute Uses (6) Sponsor / PM / roles (OPTIONAL)	Collect emails for key people involved with the Project to enable Notifications to be generated.
	Attribute Uses (7) Targeting (OPTIONAL)	Lock Project Scoring to named Respondents. Can be set up as either import of string of emails OR built from a Form.
	Attribute Uses (8) Other context (OPTIONAL)	Any additional 'tags' that are useful can be added to support either Reporting or Panel building (e.g. flag 'mandatory projects').
	Attribute Uses (9) Value Scores	The output of your model(s) is a 0-100 score for every project that will be saved as an Attribute.
	Attribute Uses (10) Value for Money	Combine Value Score and Resource to generate 'Value' metric. May require scaling factor (e.g. x1000).

See more materials here on Client Hub

[Configure Attributes]

Good planning will make configuration very easy - why not use our excel toolkit to help?

SET-UP SOFTWARE (2)

Set up Pipeline to make it easy to bring in and organize Projects for your review

	Step	Description
Configure Pipeline	Configure Kanban - Labels	Set Labels for naming convention for 'Projects' (e.g. programs / features / alternatives etc).
	Configure Kanban - Stages	Create stages for your decision (e.g. New / Ready to Score) AND outcomes (e.g. Approved / Rejected).
	Data Collection Tools - Forms	Create custom forms for collecting Attribute data - use Mandatory / Read Only settings to manage compliance.
	Data Collection Tools - Notifications (OPTIONAL)	Add triggers to send targeted emails when Kanban status changes.
	Data Collection Tools - To Do Lists (OPTIONAL)	Use Reports section as data collection tool if needed.
	Collect Alternatives - 3 options for loading projects	Review where project data will come from & how to get it into TransparentChoice.
	(1) Data Import	Build project list in Excel (typically as export from system of record) and import directly into the software. Ideal for a mature portfolio.
	(2) Request Page	Set up Request Page for colleagues to click a URL and get access to a Form to add New Projects. Great for ideation.
	(3) Manual Entry	Add projects directly into the Kanban. Quickest solution for small number of Projects.
	Organise Alternatives - Lists	Use Attributes / Kanban Status / Other Lists to create dynamic buckets of programs. These are for Assessment Panels + Reports.
	Organise Alternatives - Other (OPTIONAL)	Explore further configuration options - Kanban views, Dependencies tracking & Decision Log.

See more materials here on Client Hub

Configure Pipeline

This is a super user-led step. Book 1-1 training for support once you have an initial plan.

SCORE & REPORT

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Collect data, then feed results into Reports. Use these Reports to build your portfolio

	Step	Description
Score Projects	Pick Scorers - Best Practice	Decide how to approach scoring to minimise noise & get the best knowledge from your colleagues. Allow time for a productive review process.
Score Projects	Pick Scorers - Configure Assessments & collect survey data from SMEs	Load SMEs into People section, then configure Assessments Panels. Mail out survey links, then chase completion ahead of meeting.
Score Projects	Collect Data - Meeting Mode + Save	Use Meeting Mode / disagreements identify misalignment. Discuss as a team & align on scores. **SAVE** panel to complete scoring.
Score Projects	Review Value Scores (OPTIONAL)	Ranking Page is optional but recommended for 'Pick One' reviews especially.
Report Results	Data Checklist	Make sure you have Value Scores / Project Data / Lists / Value for Money / Kanban Stages done.
Report Results	Create Reports - Data Vizualisation	Build & share Reports. Apply settings, then add Metrics, Bar Charts, Scatter Plots & customise project level data.
Report Results	Make your Decision	Use Reports to set Kanban Status / Lists - building out a final portfolio to make the best use of resources.
Report Results	Build Scenarios (OPTIONAL)	Create alternative portfolios if required to offer different choices. Use Reports to compare outcomes.
Report Results	Extract Data (OPTIONAL)	Ad-hoc work outside the software by using Export functions. Download all Attributes from Dashboard view, detailed Criteria scores from Ranking, or Voting data from Assessments.

See more materials here on Client Hub

Score Projects   **Report Results**

line up your results to inform your budgeting process for maximum impact

READY IN 8 WEEKS

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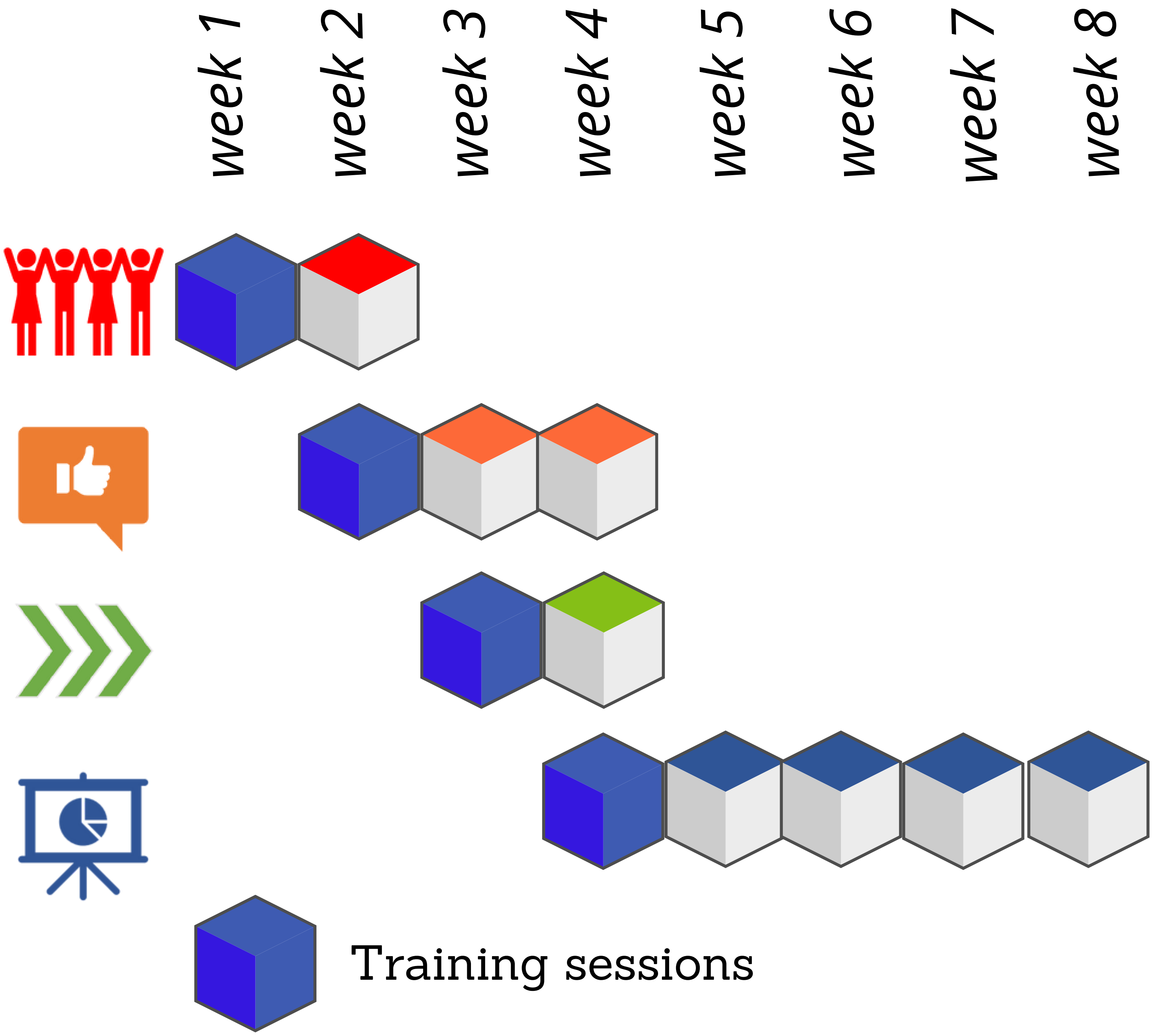
Compress delivery into 8-12 weeks with our 4 step training program



schedule 4 training sessions with us now to get moving with the software

WANT MORE?

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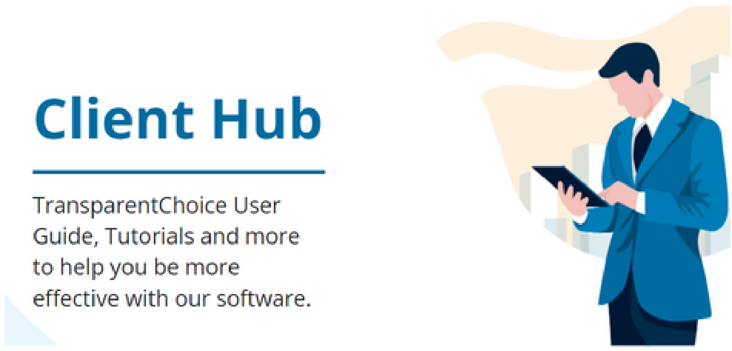
Watch the video, download the spreadsheet, visit the Client Hub, or go to our Help pages

click here to get started



click here for free resources

***client@tch** to access*

*click here to get **Help***

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[Configure Attributes](#)
[Configure Pipeline](#)
[Score Projects](#)
[Report Results](#)