IntelliVen Operations Advisor (IVOA) Sandbox

Quick User Guide

Launch intelliven.com > SANDBOX to develop and refine your **Mandate** and **WHAT-WHO-WHY (W-W-W), and Change Frameworks (CF).**

Overview Tab

Top-right

- Your Name + Organization

- Dark-mode toggle

- Log-out arrow

- Export: PDF or DOCX of current work

Left sidebar

- Four buttons for **MANDATE** functions

- Four buttons for **W-W-W** functions

- Three buttons for **Change Framework** functions

Status panel

- Active Participants – teammates currently in the Sandbox under this org code

- IVOA Tasks – total functions run for this organization

- Latest IVOA Action – most recent function and user

Initiated IVOA Functions

- Checklist of completed functions

- Time-stamped audit trail of all Sandbox activity

Recent IVOA Sandbox Activity

Past entries, newest first, appear below.

Mandate Tab

Infer:

- Paste and **Submit** a webpage **URL** in the space provided. The tool will read the page and infer a mandate based on its content. Repeat with other webpages as desired.

- Upload and **Submit**, one at a time, any number of documents (e.g., management presentations, brochures, fact sheets, or others) to provide more context.

- Content generated upon each submission of a web page and uploaded document are automatically loaded for submission to the Assess & Suggest function.

Assess & Suggest:

- Inferred content is automatically loaded for assessment, hit submit as is or with any desired edits

- You are also welcome to manually enter your version of the organization's mandate in the **Assess & Suggest** section.
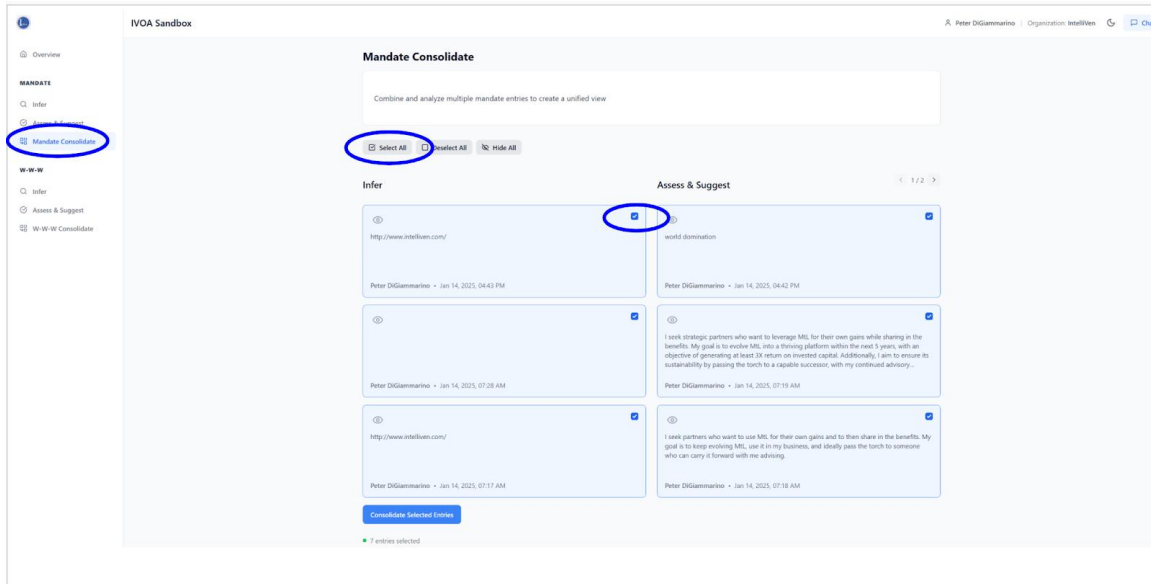
- Click **Submit** to generate an assessment and suggestions for an improved entry based on the logic used to create a strong mandate which will include both financial and non-financial components.

Consolidate

- Once you've inputted more than one inferred and / or manual entry, click **Consolidate** and then **Select** entries for which you wish to generate lists of similarities and differences as well as a suggested upgraded consolidated version then press **Consolidate Selected Entries** in the blue box in the lower right..

- As desired, you can further edit and resubmit entries, including the consolidated suggested version, for additional assessment and suggestions.

- Discuss and compare entries, feedback, and suggestions with teammates to agree on a consolidated version. The IVOA Sandbox won't give you a final answer; it's simply offering a starting point to help launch your team's discussions.

Notes

The **W-W-W** and **CHANGE FRAMEWORK** tools work similarly to the **MANDATE** process but include input bubbles. You can fill out all entries for assessment and suggestions or choose to work on one or any collection at a time.

The IVOA Sandbox logic generates assessments and suggestions upon any number of entries which may create the impression that your entry is never fully "satisfied." This is intentional, as only you and your team can determine when you've iterated enough to be satisfied with your work.

- Solicit and incorporate input from stakeholders within your organization. The more input, the richer the thinking, and the better the result.

- Review your work with advisors, customers, partners, employees, etc., and refine it based on their feedback.

- Share your group's work with your MtL Cohort for peer feedback and to practice verbalizing your ideas.