



## Business Case Roadmap - immersion approach

The ideal minimum period is two weeks elapsed with a total of seven days consulting involved for a team of two. This estimate depends of course on the complexity levels and the availability of key people to input into the process when required.

### 1. Business briefing.

**Purpose:** Develop a strong sense of the ability of the business to capture the benefits from this project.

**Format:** It may be a very simple procedure requiring a few one to one discussions, or we may carry out PEST and SWOT workshops to surface the big picture and stimulate clear thinking.

**Outcomes:** A clear agreed picture of what the business expects to achieve and a sense of who, how and when, in terms of realising the benefits.

**Outputs:**

1. One page summary, overview and benefits realisation appraisal signed-off by stakeholders.
2. A list of executives to be interviewed for more detailed investigation and high level estimation.

**Duration and effort:** One day's work for one to two consultants spread over two days.

**Method:** We agree a stakeholder list in advance and a schedule of meetings and or a workshop and any extensions to this standard template that may be deemed necessary. We agree the risks to our achieving an acceptable outcome and we establish the key assumptions and known issues in advance. We provide an invitation email that you forward to all stakeholders.

We attend at the agreed times and on conclusion, we present our findings and recommendations in your favoured way. The results of this phase forms the basis for any continued work going forward.

### 2. KPI establishment

**Purpose:**

- Translate the outcomes of the initial phase into detailed KPIs to be achieved by individual directors, VPs and managers in operations , or other affected areas and discuss with them in detail how easy, or difficult it will be and what the critical factors for success will be.

- Discuss the available data and establish what is required in order to produce meaningful data for the agreed KPIs or establish alternatives.

**Format:**

- Interviews with up to five C level and senior managers individually plus one, or two interactive workshops with all of the participants to test the big picture, surface any key facts that have been missed and get conviction on the feasibility of delivering the expressed benefits.
- Workshop with IT and or Business Intelligence executives to establish how KPI data can be reliably collected and presented.

**Outcomes:**

A clear picture of who in the business will do what differently in order to deliver the benefits.

A strong sense of the viability of the project and a better grasp of the risks involved.

**Outputs:**

1. Summary benefits realisation plan
2. Stakeholder map for both project board and communications plan
3. First draft risk assessment log

**Duration and effort:**

Three days work spread over 5 days with two consultants involved

**Method:**

We work strictly from the outputs of the Business briefing phase. We make no attempt to motivate or to judge stakeholders, but simply record their inputs and suggestions on the assumption that all contributors are equally motivated and skilled to deliver their part of the project. We make no assumptions on the availability of time, know-how, or other resources at this point.

### **3. Cost estimation and financial workings**

**Purpose:**

This is a critical exercise in determining the cost prior to detailed workings and analysing cost and benefit. We present figures with Net Present Value calculations to obtain a strong sense of the true likely costs and returns over time as early as possible, with built in adjustments for confidence levels and discount rates.

The resulting financial model can be easily interpreted and can be subject to various adjustments to get a good indication of the room for variances from the predicted costs, returns and timescales.

**Format:**

Proposed solutions will be estimated via the most accurate information sources available including where possible, conversations with previous clients of the likely suppliers, public domain case studies and worked up estimates based on the inputs of experienced people.

**Outcomes:**

A clear, though not yet final understanding of the costs involved and likely returns, likelihood of slippage and the room for variances, thus providing a good insight into the financial risk/reward balance. Fit for purpose means that it provides a solid basis on which to make a financially based decision.

**Outputs:**

1. A spreadsheet based model with clear descriptions and annotations
2. A description of the methodology used

**Duration and effort:**

Three days work for two consultants over 4 days

**Method:**

The calculations are recognised as a critical decision tool, but are also recognised as a work in progress and are therefore presented with a clear picture of the stretch factor based on exploration of the likely best and worse case scenarios. The figures will also be presented with a recognition of the critical success factors and the actions open to the business to reduce risk and maximise returns as well as identifying the key stakeholders who will be in a position to influence these outcomes.

**Overall outcomes of the engagement**

In just seven days, you will achieve a sound understanding of the risk and reward relationships between the proposed benefits and the expected costs with an accurate view of the critical success factors and the likelihood of slippages as well as an appreciation of the room for slippage that exists. You will have a clear picture of who will be responsible for realising the benefits and they will have had an opportunity to input into the process and influence the decision.

Based on the above you will have first draft risk register that spells out the main risks and describes the approaches you can take to manage them.

**Final outputs.**

An outline business case that places in the context of your organisation and the current operating climate, the goals of your proposal, the likelihood of reaching them and the cost benefit analysis needed to support your decision.

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### **What you should do next.**

Equipped with your business case and a stakeholder list of those whose input was key to the document, you should arrange a stage gate review meeting with all of your important stakeholders and make a decision on whether to proceed or not.

To find out more contact [requirements@thebridger.co.uk](mailto:requirements@thebridger.co.uk)