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Benefits-led IT at Newcastle

Benefits Assessment Workshop:

an initial workshop to explore an idea / opportunity prior to detailed work to develop a benefits realization plan

Is this an opportunity worth exploring further?

A workshop session to run with a small group of key stakeholders.

This Workshop Benefits Assessment

- Context and objectives
- Two perspectives on the opportunity
 - Stakeholder expectations
 - Investment portfolio
- Next steps



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Context: Definitions (#1)

- Business benefit
 - An advantage on behalf of a particular stakeholder or group of stakeholders.

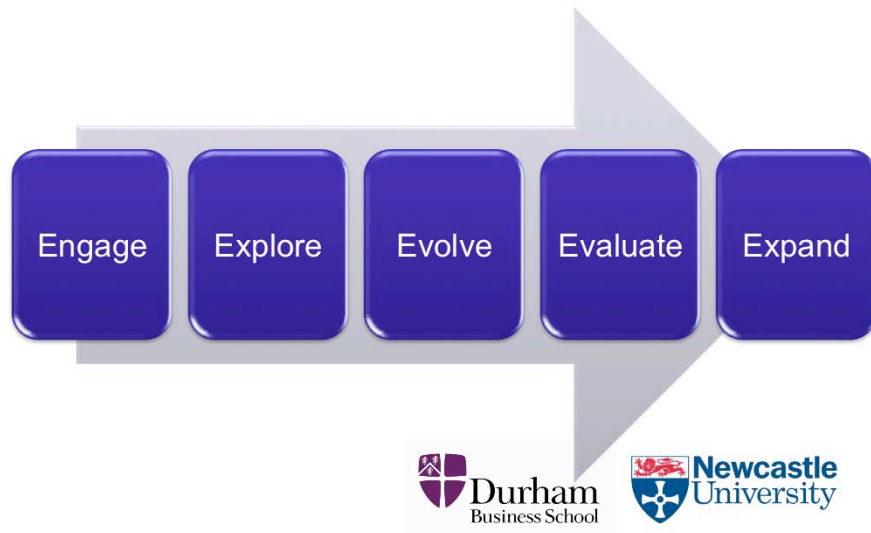
- Stakeholder(s)
 - An individual or group of people who will benefit from the investment or are either directly or indirectly involved in making or are affected by the changes needed to realise the benefits

See Benefits Management (2006) by Ward and Daniel. Published by Wiley



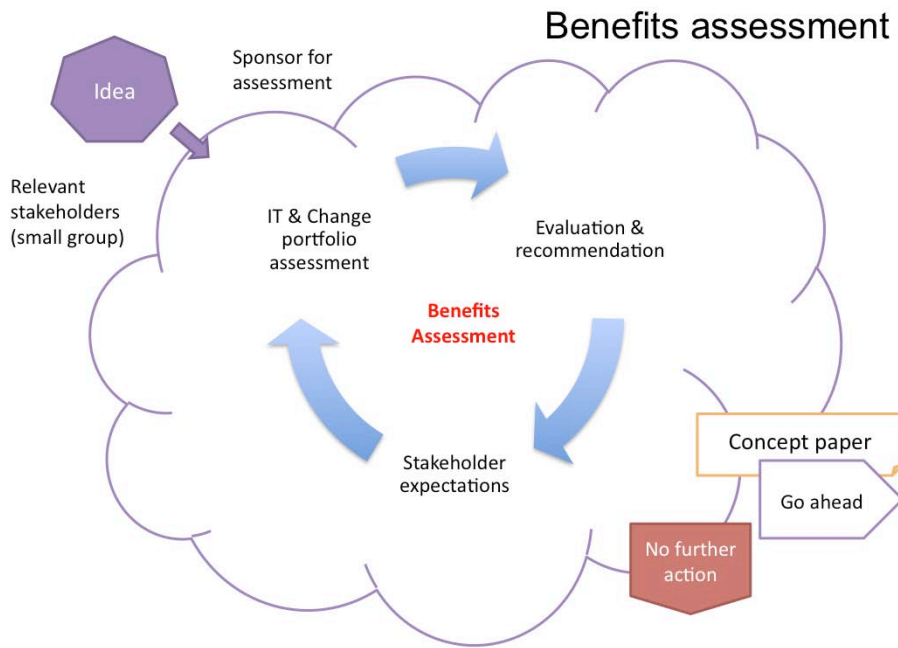
This slide and the next two can be used to provide a brief introduction to the benefits-led approach and the role of the benefits realisation plan.

e⁴⁺¹ Project Framework



The workshop is part of the Engage stage of the project lifecycle

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The diagram can be used to provide an overview of the Benefits Assessment in taking the initial Idea and getting informed agreement on next steps. This can include taking no further action or developing a Concept paper that outlines the opportunity.

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Objectives of the Workshop

- Explore an opportunity and agree whether to carry out further work to develop a benefits realization plan.
- To agree who to involve in any further work.



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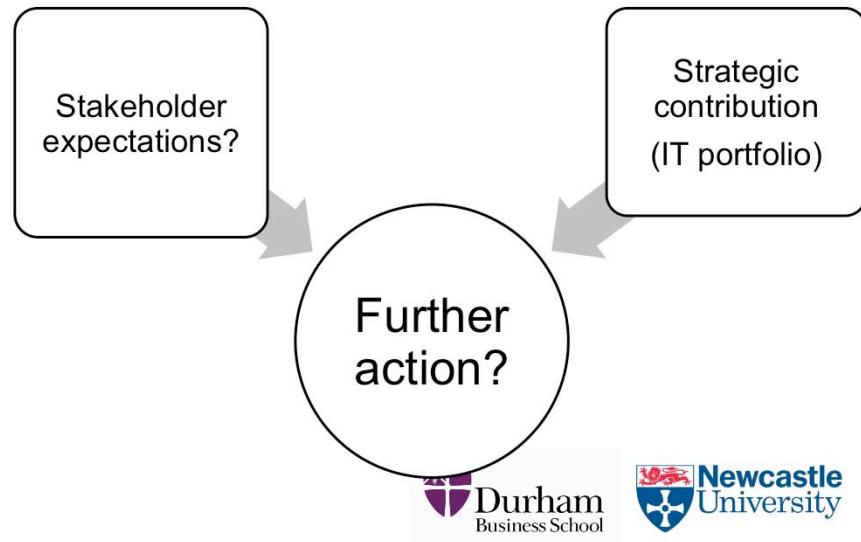
Two Perspectives on the Opportunity

1. **Focus on stakeholders: expectations and benefits**
2. **The investment portfolio: exploring the strategic contribution of the investment**



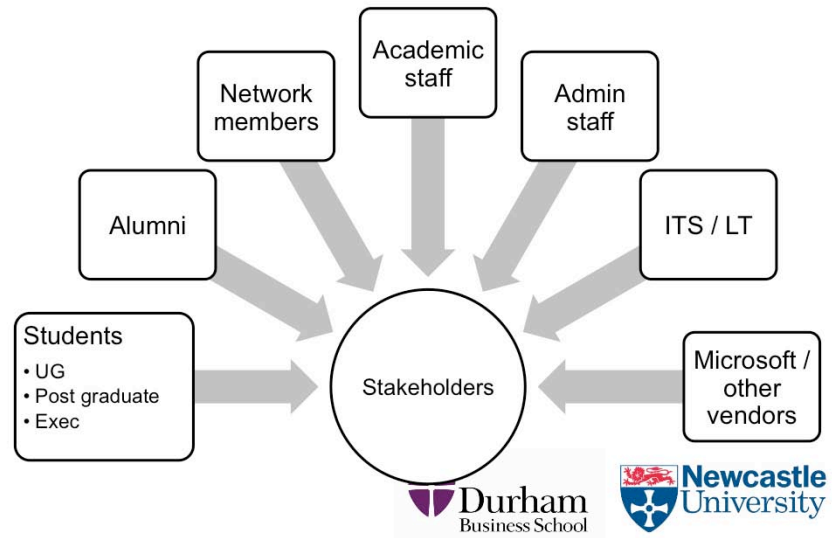
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Example: Stakeholders for eLearning



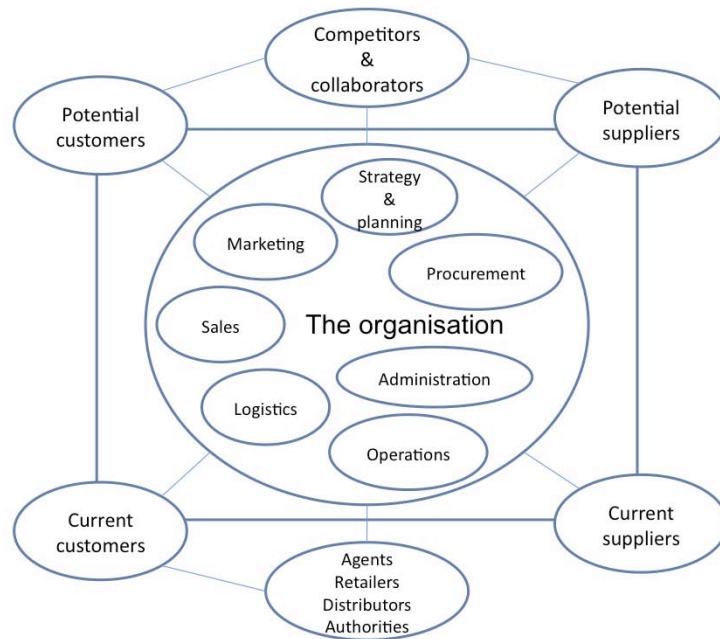
The next slides illustrate how the two techniques are used to explore the opportunity.

Example: Stakeholders for eLearning



Step 1: who are the stakeholders. Brainstorm then review. Think about segmentation. For example are students one group or many?

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Generic stakeholders. Can use to check completeness of the discussion of relevant stakeholders.

A BUSINESS INTERACTION MODEL FOR E-BUSINESS REQUIREMENTS ANALYSIS.

Malcolm Bronte-Stewart School of Computing University of Paisley

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Example: Stakeholder Expectations

executive students

Ref	Expectation	Rank
1	Wireless network – keep in touch	
2	Ease of integration with working environment	
3	Rapid access to academic staff – regardless of location	
4	Ability to contact other participants easily to get advice	
5	Develop eLearning skills for the workplace	
6	Integrate learning at different times and places	
7	New ideas – see innovative use of technology to enable learning	

C = Critical; I = Important; D = Desired;
A = Avoid (we do not seek to meet this expectation);
N = New (need to create this expectation)



Once the stakeholders are identified brainstorm the expectations / potential benefits for each group. As a second pass classify each expectation.

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Stakeholder Expectations

academic staff

Ref	Expectation	Rank
1	Ease of integration with working environment	
2	Easy to learn / use	
3	Fit with a range of teaching styles	
4	Reduce administrative load	
5	Positive impact on learning	
6	Advice on how to use effectively – design of learning activities	
7	Advice on how to use effectively – facilitating online discussion / working	
8	Minimise effort to change from / fit with current approach	



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Stakeholder Expectations

admin staff - management

Ref	Expectation	Rank
1	Low cost to implement and run	
2	Strengthen market position	
3	Support business development efforts	
4	Do not devalue face to face experience	
5	Common platform – rapid fit to different needs	
6		
7		
8		



Your Project

- Who are the key stakeholders / stakeholder groups?
- What are their expectations / the potential benefits?
- Are there any specific issues to note?
- **What opportunities for action are there? What is the opportunity you want to investigate further? How does the proposal contribute value to stakeholders?**



Looking across the expectations of different stakeholders will help identify the potential contribution of the opportunity that has been the basis for the workshop. The workshop may result in new ideas about the opportunity & what's important for stakeholders.

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Stakeholder Expectations

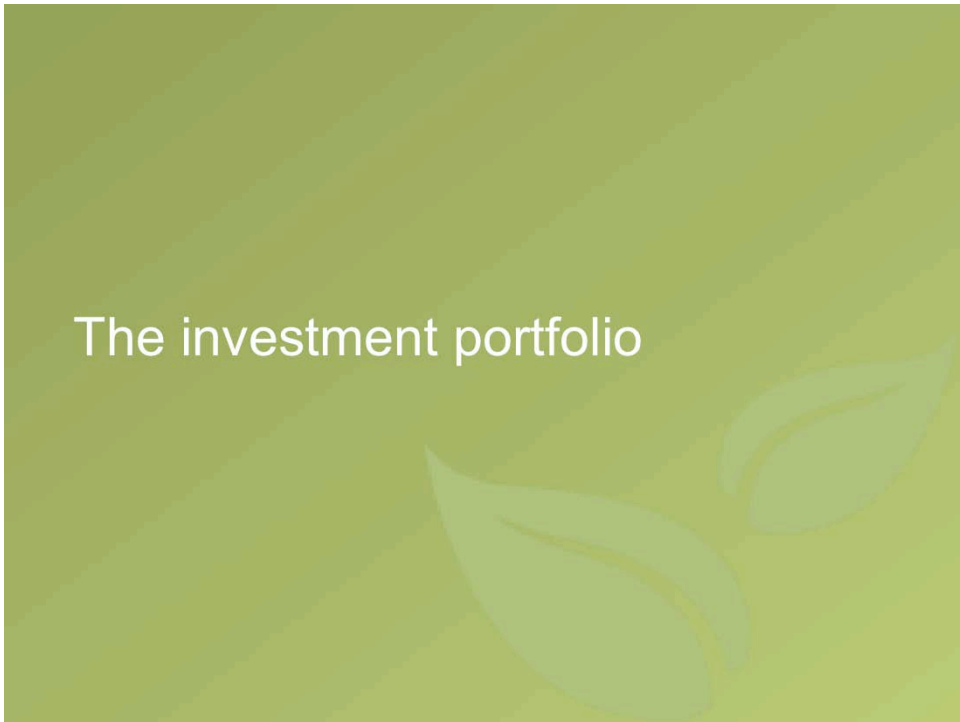
who?

Ref	Expectation	Rank
1		
2		
3		
4		
5		
6		
7		
8		



A template for use in the workshop

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The portfolio helps explore how the opportunity relates to the strategic objectives of the organisation

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IT & Change Portfolio

	Strategic	Exploratory
Transformational change / doing new things	<i>critical to achieving strategic objectives</i>	<i>may be important in achieving future success</i>
Improving the current business	<i>critical to existing business operations</i>	<i>valuable but not critical to success</i>
	Core Operations	Support

Based on McFarlan 1981

Explain the portfolio model

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Your Idea / Opportunity...

- **Where does it fit on the investment portfolio?**
 - What strategic objectives does it contribute to (if any)?
 - Chose one quadrant of the portfolio or treat the project as a programme & split it into individual projects that do fit in one quadrant



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Action Planning

- How does the proposal relate to other ideas / plans?
- Is there support for further action to develop a benefits realisation plan?
- When?
- What are the next steps for further action on the proposal?
- What needs to be undertaken? By when?
- Who can take a lead and/or support for each action?



On the basis of the stakeholder expectations and portfolio analysis consider the potential value of the idea.

break time!



Thank you

