

Overview

This Job Aid defines the steps to follow for creating and managing business cases in Sensei IQ.

While creating and managing business cases is optional, as you can always create projects directly, we recommend creating and ultimately approving business cases, as it helps ensure that organizational resources are focused on the business cases/projects that deliver the most value to the organization.

There are three (4) core actions required for creating and managing business cases. Though defining resource requirements for business cases is optional, we recommend doing so to ensure the organization understands the level of effort that will be required to deliver the project if it is approved. We also recommend capturing the prioritization criteria as it helps ensure the best business cases are approved to become projects.

1. Creating and maintaining business cases
2. Capturing business case prioritization criteria
3. Defining business case resource requirements
4. Managing the business case approval process

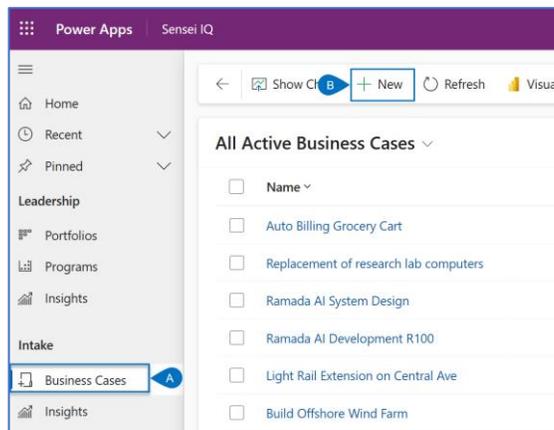
Creating and maintaining business cases

 **Portfolio/Program Manager**

 **Portfolio – New Business Case**

1. DEFINE THE NEW BUSINESS CASE

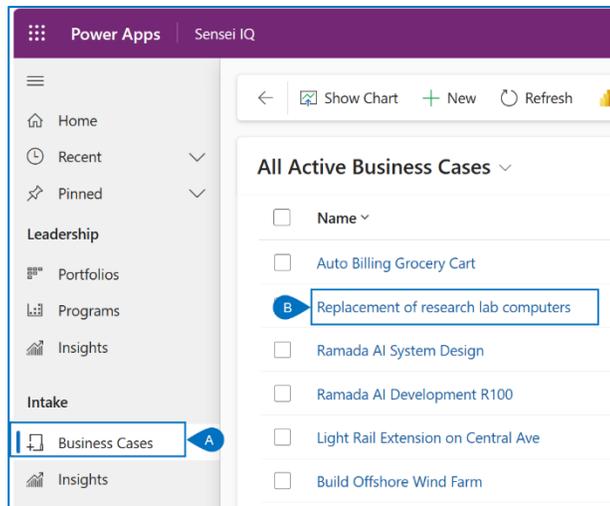
- a. Ensure you are in **Portfolios**, and click **Business Cases** in the **Intake** section.
- b. Click **+ New** from the command bar.



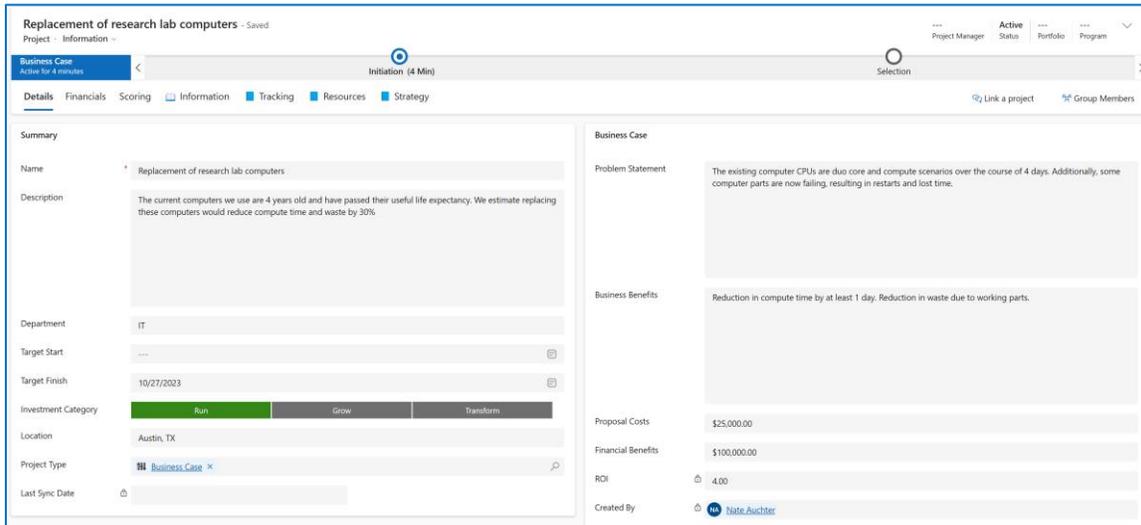
- c. Complete the **Business Case pane** with as much information as you have now.
- d. The **Business Case Name** field is mandatory.
- e. Ensure the **Project Type** is set to **Business Case**.
- f. Provide a **description** to better describe the reason **this business case should be approved**.
- g. Leave the **External Project Schedule** as the default **None**.
- h. Click **Create** to save the new business case.

2. UPDATE AN EXISTING BUSINESS CASE

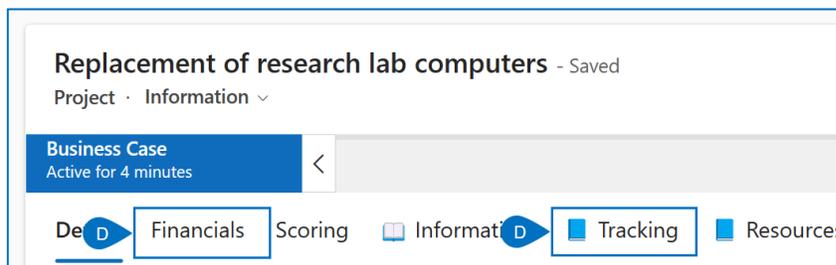
- a. Select **Business Cases** from the **Portfolio Site Map** to display the list of Active business cases.
- b. **Select the Business Case** to be updated.



- c. **Update any field** on the Business Case.



- d. Refer to other **job aids in the Projects area** to get more details on maintaining the information on the **Financials and Tracking** tabs.



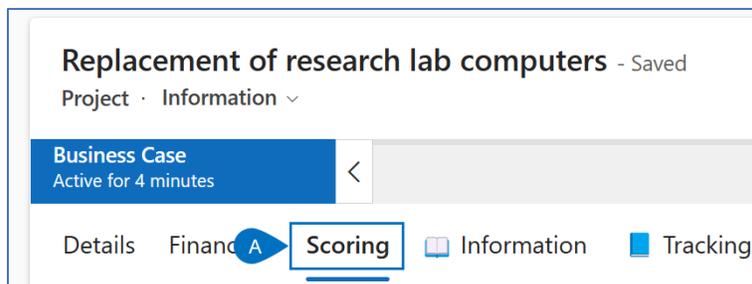
Capturing business case prioritization criteria

Portfolio/Program Manager

Portfolio - Current Business Case – Scoring

1. CAPTURE BUSINESS CASE PRIORITIZATION CRITERIA

- a. Open the **Scoring** tab.



- b. Select each of the **scoring criteria** and **pick the best value** to represent the business case.

Investment --Select-- **B**

- Organizational Impact ✓ --Select--
- Organizational Risk --Select--
- Strategic Alignment **B**
 - None - No cost or effort impact to the organization
 - Low - Low cost or effort impact to the organization (<\$5K)
 - Medium - Medium cost or effort impact to the organization (>\$5K <\$25K)**
 - High - High cost or effort impact to the organization (>\$25K <\$100K)
 - Extreme - Extreme cost or effort impact to the organization (>\$100K)
- Priority Score **B**

c. Click **Save** to calculate the **Priority Score**.

Replacement of research lab computers - Saved
Project · Information

Business Case Active for 4 minutes Initiation (4 Min)

Details Financials **Scoring** Information Tracking Resources Strategy

Project Scoring

- Investment Low - Low cost or effort impact to the organization (<\$5K)
- Organizational Impact Medium - Moderate impact in terms of personnel or organizational change in the organization
- Organizational Risk High - Significant risk due to overhaul of many departmental processes and technologies
- Strategic Alignment Medium - Directly aligned with one strategic goal

Priority Score **C** 11

Defining business case resource requirements

Portfolio/Program Manager

Portfolio - Current Business Case – Resource Plan

1. CREATE GENERIC RESOURCE REQUESTS

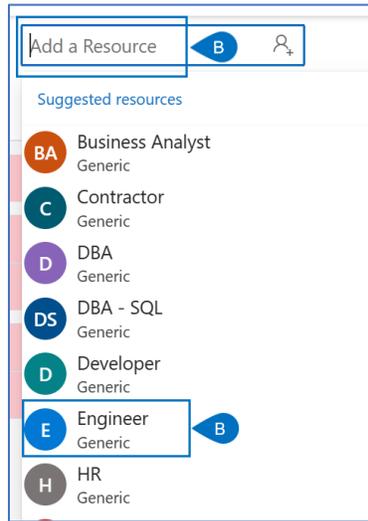
a. Open the **Resources** tab grouping and then ensure you are on the **Resource Plan** tab.

Replacement of research lab computers - Saved
Project · Information

Business Case Active for 19 minutes

Details Financials **Scoring** Information Tracking **A** **Resources**

b. Search for and select the **Generic resources** with the skills that will be **required on the project** if the **business case is approved**.



- c. **On a time period basis**, define the **number of hours** each generic resource will be required **to complete the project**. If **multiple resources** are required ensure the number of hours **reflect the total effort to be completed**.

Resource Plan											
Override Sell Rates											
Information											
Tracking											
Resources											
Strategy											
Add a Resource											
Visible Period Total ←											
Requests by Primary Role											
May 2024											
June 2024											
July 2024											
	P	C	P	C	A	P	C	A	P	C	A
Totals	1,210.0	0.0	70.0		0.0	130.0		0.0	250.0		0.0
^ Engineer	1,140.0	0.0	60.0		0.0	120.0		0.0	240.0		0.0
.. Generic	1,140.0		60		0.0	120		0.0	240		0.0
^ Project Manager	70.0	0.0	10.0		0.0	10.0		0.0	10.0		0.0
.. Generic	70.0		10		0.0	10		0.0	10		0.0

- d. Click **Save** at the bottom of the form when you are done.

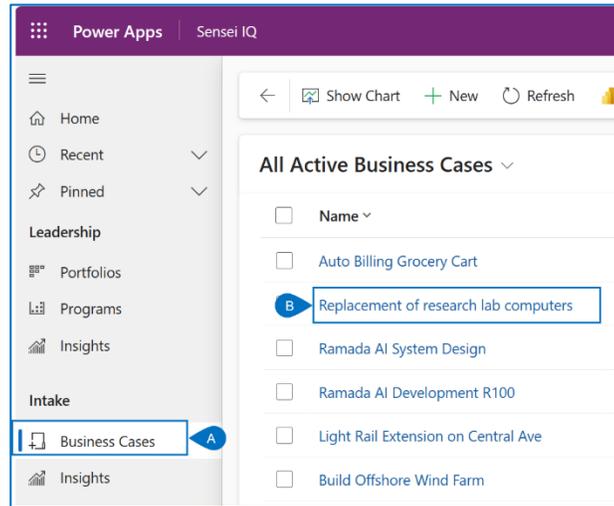
Managing the business case approval process

 Portfolio/Program Manager

 Portfolio - Current Business Case – Process Flow

1. ADVANCE THE BUSINESS CASE TO THE NEXT STAGE

- a. Select **Business Cases** from the **Portfolios Site Map** to display the list of Active business cases.
- b. **Select the business case** to be updated.



- c. Click the **current stage**.
- d. **Update the Stage** dropdown pane.
- e. Click the **Next Stage/Finished** button.
- f. Click **Save & Close**.

