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ICT Guideline

Strategic Alignment Workshop

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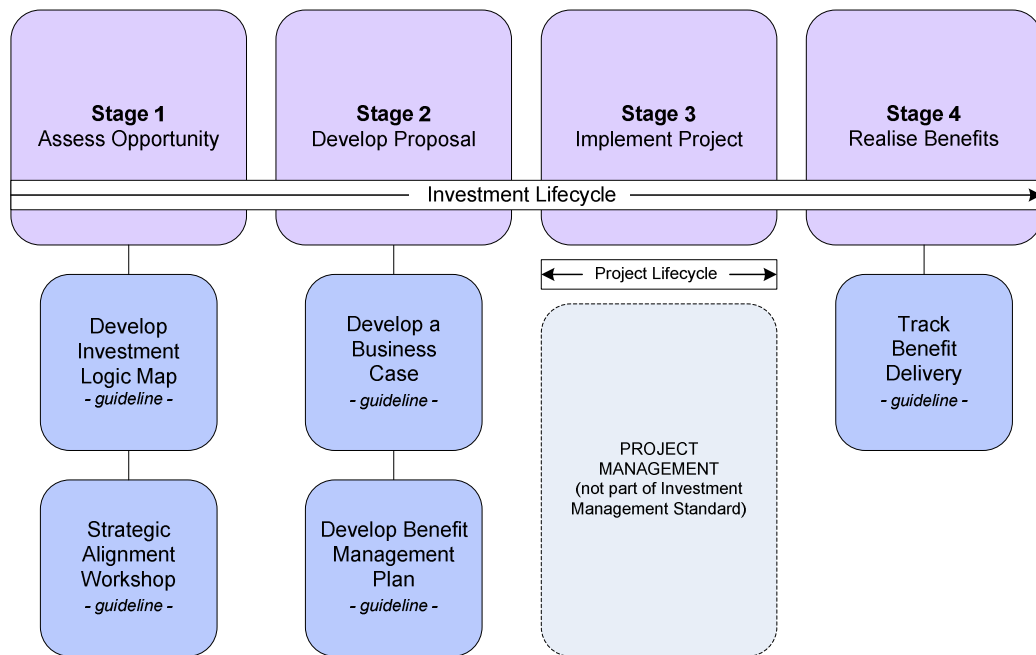
1 About this guideline

The Investment Management Standard involves five separate activities as depicted in Figure 1 below.

The first activity is the development of an Investment Logic Map. This provides clarity as to why an investment is being considered and allows a general understanding of the business changes and ICT enablers will be required if the identified benefits are to be achieved.

The second Investment Management activity is the Strategic Alignment Workshop. The purpose of the Strategic Alignment Workshop is to consider the identified business need in the context of the broader strategic issues that will shape the investment solution so that it provides maximum value to the investment and to the enterprise.

Figure 1: The Investment Management Guidelines



1.1 The purpose of the workshop

The success of any investment is impacted by the selection of a solution that best responds to its drivers and is able deliver its planned benefits. Often this selection is undertaken without the benefit of knowledge of what might exist outside the specific program area. This typically results in the selection of solutions that cost more, take longer to develop and deliver sub-optimal benefits.

The Strategic Alignment Workshop provides a forum where the best knowledge can be brought together with a view to shaping the preferred investment solution.

The workshop also provides a rare and practical opportunity to give affect to whole-of-enterprise policies and standards.

1.2 Who should participate

The success of a Strategic Alignment Workshop will be determined by the composite knowledge of the participants and their preparedness to work towards what are the best ideas for the particular investment need. Participants should include:

- The investor who has previously identified the need to make an investment and is seeking the best investment solution
- The business analyst responsible for specifying the investment solution
- A representative of whole-of-enterprise ICT strategy
- A representative of represent whole-of-enterprise business strategy
- Representatives of other organisations who may have developed similar solutions.

The ideal size of the group is 5 to 7 people.

1.3 What process is used

The workshop requires a facilitator (either internal or external) who adopts the following approach:

1. Understanding the need
 - Using the Investment Logic Map developed previously the investor provides information as to the investment need and any constraints or parameters relating to the solution
 - Discussion is encouraged to clarify and provide a common understanding of the need
2. Scoping a possible solution
 - The business analyst who will be ultimately responsible for specifying the solution will outline their current thinking on how the solution might be shaped
3. Exploring how the solution might be improved
 - Open discussion will then proceed aimed at drawing responses to several questions
 - I. Is there general agreement as to nature of the required solution?
 - II. Is there a need to reshape the solution so that it aligns better with strategic whole-of-enterprise business or ICT directions?
 - III. Do capabilities exist elsewhere that could be leveraged to provide all or part of the solution?
 - IV. Will the solution that is delivered provide the capability to meet similar whole-of-enterprise investment needs in the future?
 - V. Are there whole-of-enterprise policies or strategies that need to be considered during the development of the solution?
4. Drawing conclusions. The workshop concludes by noting any issues that might provide input to:
 - The specification of the business solution by the business analyst
 - Future whole-of-enterprise strategy development

The duration of a workshop is dependent upon the nature of the planned investment but will normally take around 1.5 hours. These workshops should never exceed 2 hours.

1.4 What are the outputs

Strategic Alignment Workshops are advisory in their nature. Their intent is to provide broader thinking that will assist the investor to choose a solution that is best suited to their needs and the needs of the enterprise. The physical outputs from the workshop will be a list of ideas, issues and opportunities raised. It is then the prerogative of the investor to decide how any of these will be used in shaping the investment solution.

Appendices

Appendix 1: Glossary

Benefit Management

Benefit management is the process of organising and managing such that the benefits expected of the investment are tracked and reported.

Benefit Management Plan

A benefit management plan is the document which identifies the benefits expected to be achieved by a specific investment and specifies the criteria for their achievement and who is responsible for their measurement and achievement.

Benefit Report

A benefit report is status report on each benefit claimed in the benefit management plan. The raw data on the KPI's is entered and the output is reflected in terms of the total benefit achieved at a point in time.

CIO

Chief Information Officer

Government

Government is the party that has the confidence of the lower house, and from whose numbers ministers are appointed.

ICT

Information and Communications Technologies

Investment Logic Map

An investment logic map is a clear, diagrammatic representation of the relationships between the investment rationale (drivers, objectives and benefits) and the project activities (business changes and IT enablers).

Investment Management Standard

The investment management standard is a document which provides direction on the implementation of this policy.

Investor

The person that has identified a business need and will be responsible for making an investment aimed at satisfying that need. The investor will ultimately be responsible for achieving the benefits that had been the intention of the investment.

IT

Information Technology

KPI

Key performance indicator

Project

A project is a planned activity that contributes to the resolution of an issue and is unique and temporary in nature. That is, has a designated end date and unique and well defined end result/s.

Appendix 2: Further Information

For further information:

- Go to <http://www.dtf.vic.gov.au>
- Select Gateway reviews and best practice guidelines
- Select Lifecycle guidance material