



Project Assessment

Purpose

To determine the scope of an existing business issue. To identify the inputs, outputs, and related processes. Issues, systems, and potential resolutions to the problem.

Process

- ◆ Agree with the project sponsor the project participants and mandate.
- ◆ Assign the appropriate resources to the project:
 - BICS – Senior facilitator and documentation expert
 - Client – Project Sponsor, Process Owner, Project Liaison, Subject Matter Experts
- ◆ Schedule 4 workshops and participants – ideally the same day over a four-week period.
- ◆ Workshop #1 – determine the ‘As is’ process and related roles and responsibilities, BICS to take away and document.
- ◆ Workshop #2 – review the results of workshop #1 and modify as required, also identify, categorize and prioritize the issues associated with the ‘As is’ process. Determine the systems utilized to support the existing process.
- ◆ Workshop #3 – review the results of workshop #2 and modify as required, also brainstorm and develop the ‘As should be’ process, related roles, responsibilities and systems required to support.
- ◆ Workshop #4 – review the results of workshop #3 and modify as required, develop the action plan required to implement the ‘As should be’ process, roles, responsibilities, systems, timelines and budget. Determine the presentation format, schedule and materials for the team to take to the Project Sponsor.
- ◆ Project Completion – present to the Project Sponsor the results of the work and the project completion report for phase I.

Payoff

- ◆ A participative plan for resolution of the identified business issue. The team that is closest to the business problem will commit to the action plan.
- ◆ A budget and timeline for the action plan is developed prior to the commencement of specific action by the team and the project sponsor.
- ◆ If required further work can be introduced at this point to formally prepare a business case of the benefits to be achieved and more detailed costing of the action plan.
- ◆ If the team identifies complex issues that are required to resolve the business issue the project can be put on hold, prior to spending any further resources or capital. This is particularly true when the team identifies that a ‘re-organization’ of roles and responsibilities is required or that another department not identified in the initial project scope must be engaged to ensure the project succeeds.