Strategy and Planning Activities
Developing an Effective GIS Business Case

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## Strategy & Planning Activities

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Strategy and Planning Activities: Process Overview

Strategy and Planning Activities

- Develop Project Vision Statement
- Develop Business Case
- Define Scope of Work
- Procurement (Optional)
- Develop Project Charter
- Develop Project Management Plans
- Develop Initial Project Schedule
- Develop Staffing Plan
- Develop Quality Assurance Plan
- Develop Change Control Plan
- Develop Communication Plan
- Develop Risk Management Plan
Strategy and Planning Activities: Developing the Business Case

- What Are the **Benefits** of the Project? How Does It Support the Mission of the Organization?
- What Are the Estimated **Costs**?
- What Is the Expected Return On Investment (**ROI**)?
- How Does the Project Relate to Other Efforts Within the Enterprise?

**ESRI Press:**
- *Measuring Up* - Outlines a Number of Case Studies and General Methodology for Doing Cost Benefit Analysis
- *Thinking About GIS* – Roger Tomlinson
Strategy and Planning Activities: Developing the Business Case

• Business Perspective
  – Describe the business need and impetus for the proposed solution
  – Describe how the solution supports your organization’s strategic objectives
  – If this is a multi-departmental initiative, identify the departments and organizations affected by this initiative.
  – How will this investment reduce costs or improve efficiencies?

• User Perspective
  – Who are the users?
  – Who are the stakeholders?

• Technical Perspective
  – Describe the proposed solution and alternatives
  – Describe the required data and acquisition strategy for new data
  – Identify all other systems that will interface with this system
  – Will these systems be reengineered (changed) as part of this investment?

Developing the proposed technical solution requires a sort of mini-spiral of the project lifecycle. The conceptual architecture needs to be envisioned and described, including data, applications, and hardware.
Strategy and Planning Activities: Developing the Business Case

- **Schedule Perspective**
  - Will the project be implemented incrementally?
  - What will be included in each of the planned phases?
  - What is the proposed schedule for all phases?

- **Organizational/Resource Perspective**
  - What internal resources will be required?
  - Will contract support be required?
  - What new hardware & software may be required?

- **Budget Perspective**
  - What are the estimated HW, SW, data and services costs?
  - What are the estimated internal costs?

The planning phase is the time to start thinking about costs. Since there are always cost constraints it is a good idea to identify the highest priority capabilities and plan for an iterative release.

**Business Case Resources:**
http://www.esri.com/getting_started/executives/success.html

**Business Case Template:**
http://www.dir.state.tx.us/pubs/pfr/05-107/buscase.doc
Strategy and Planning Activities: Key Outputs/Products

• Business Case
Strategy and Planning Activities: Summary of Best Practices

- Identify Project Stakeholders and Understand their Criteria for Success

- A Well Defined Vision Will Help Avoid Scope Creep at All Stages of the Implementation
Strategy and Planning: Additional Resources

• ESRI Project Center Resources
  – http://support.esri.com/projectcenter

• Project Vision Statement Template
  – http://downloads.esri.com/support/ProjectCenter/Project%20Vision%20Overview.pdf

• Business Case Resources
  – Measuring Up - outlines a number of case studies and general methodology for doing cost benefit analysis
  – Thinking About GIS – Roger Tomlinson

• Business Case Template
  – http://www.dir.state.tx.us/pubs/pfr/05-107/buscase.doc

• Sample GIS RFP

• Project Management Body of Knowledge (PMBOK)
  – www.pmi.org
Questions?