

Business Case Workshop

Applied Learning, Team-Based Training and Certification Program

INTRODUCTION

Shouldn't all product and business investments provide a positive return? Of course they should. However, when we look at the intended impact of business cases, the results aren't always obtained. Why? Often, the data or fact base on which the business case is created is not verified or valid. Or perhaps cross-functional support was lacking, or the forecast was miscast. From another standpoint, many "approved" strategic initiatives aren't fully analyzed for business impact, resulting in sub-par ROI. The imperative to improve business case performance and optimize results has never been more important.



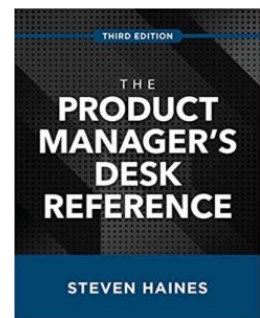
PROGRAM FOCUS

The methodology involved in creating business cases can be more deeply woven into the fabric of the firm if people understand what's to be done and how. That's why this program was developed. It's designed to help designated teams to collaborate in the creation of business cases for business, product, or product-related investments, including:

- New products or major enhancements
- Product operational improvements
- Cost-saving programs
- Business infrastructure for product operations
- Market expansion initiatives

HOW IT WORKS

- Executives appoint teams (usually cross-functional) of 3-6 people to work on a business case for one or more explicit product or market-related initiatives. We meet with key stakeholders to review the program scope and ensure that teams are equipped to handle the pre-program data collection, as well as the actual work involved to prepare and present the business case. Usually, 3-5 teams participate in any one program.
- We facilitate a two-day workshop where the teams work on, and present various aspects of the business case. They follow a standardized template that helps them to orchestrate the flow and develop a cogent, believable story line (see next page).
- As an option, teams can review, and receive coaching for their evolving case. Two or three 60-minute review sessions are planned so they can prepare their final presentation to management.
- The program leverages several resources, including the mini-book: How to Create a Business Case and The Product Manager's Desk Reference (3^e).
- Certification may be earned when a team completes their final presentation to management, or submits their business case for review, and participants complete the business case certification exam.



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WORKSHOP STRUCTURE

The Business Case Workshop follows the format and flow represented in the diagram below. Each section is a module in the workshop, punctuated with interactive, team-based exercises designed to reinforce current knowledge, augment understanding, and offer a challenging environment to consider the company's investments and its strategy. The structure, while seemingly linear is far from that; it's iterative and dynamic. This means that the team might have progressed to a specific point but might have to re-explore various topics and assumptions as it proceeds.

OTHER OPTIONS

Because we work closely with our clients on these important initiatives, we may customize the program to include more in-depth focus on items such as pricing, customer or market analysis, forecasting, and other areas.



BENEFITS

- Teams and leaders make better business decisions
- Creates a platform for consistency and productivity
- Raises the level of business and financial acumen across disciplines
- Produces auditable artifacts
- Assures effective implementation and integration with the company's operation



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