Business benefit realisation

Tomasz Malkiewicz

2020-02-13

NORDIC E-INFRASTRUCTURE COLLABORATION

Outline

- How are we organized (MB, TM)
- Project life cycle, *benefits* and *business change* (TM)
- *Business case* (MB)
- Benefit realisation management *(BRM)* (TM)

How we are organised

NICEST2

NeIC NICEST-2 Negotiations meeting

Monday 13 Jan 2020, 09:15 → 15:30 Europe/Oslo

NordForsk offices

Description **Invited:**

Hamish Struthers, NSC, SE
Anne Fouilloux, UiO, NO
Antti-Illari Partanen for Risto Makkonen, FMI, FI
Øyvind Seland, METNO, NO
Mats Bentsen, NORCE, NO
Yanchun He, NERSC, NO
Antti Pursula, CSC, FI
Markku Kulmala, University of Helsinki/INAR, FI
Shuting Yang for Peter Lang Langen, DMI, DK
Ralf Doescher, SMHI, SE
Michaela Barth, NeIC
Kine Bugge Halvorsen, NeIC
Gudmund Høst, NeIC director (first half until lunch)
Tomasz Malkiewicz, NeIC (first half until lunch)

Agenda:

09:15 - 12:00 Joint NICEST2 and Puhuri session

09:15 - 09:30 Opening, round table introductions
09:30 - 09:45 Introduction (GH)
09:45 - 10:15 Business benefits' concept (GH)

10:15 - 10:30 Coffee break

10:30 - 11:00 Project life cycle, benefits and business changes (TM)
11:00 - 11:30 Business case (MB)
11:30 - 12:00 Business Benefit Realisation (TM)
12:00 - 12:15 Summary (GH)

12:00 - 13:00 Lunch

13:00 - 15:30 NICEST2 session

Puhuri-negotiations-Feb-2020

Puhuri negotiations meeting Oslo 13.02.2020

Agenda [edit]

- 09:15 - 12:00 Joint NICEST2 and Puhuri session (materials at https://indico.neic.no/event/120/)
- 09:15 - 09:30 Opening, round table introductions
- 09:30 - 09:45 Introduction (GH)
  - Clarifying any open questions

Invited participants [edit]

- Gudmund Høst, Director, NeIC
- Kalle Happonen, CSC – IT Center for Science, FI
- Hans Eide, Uninett Sigma2, NO
- Per-Olov Hammargren, SNIC, SE
- Ilja Livenson, ETAIS, EE
- René Løwe Jacobsen, DeiC, DK
- Ebba Þóra Hvannberg, University of Iceland, IS
- Rob Pennington, Special Adviser, NeIC
- Tomasz Malkiewicz, Project Owner, NeIC

Minutes [edit]

- https://docs.google.com/document/d/1OEowcsNxCqoQ_jH1XHL9se2LAVRVDJ0WZGTezcthdH8/edit#

Category: Puhuri

Project life cycle, benefits and business change

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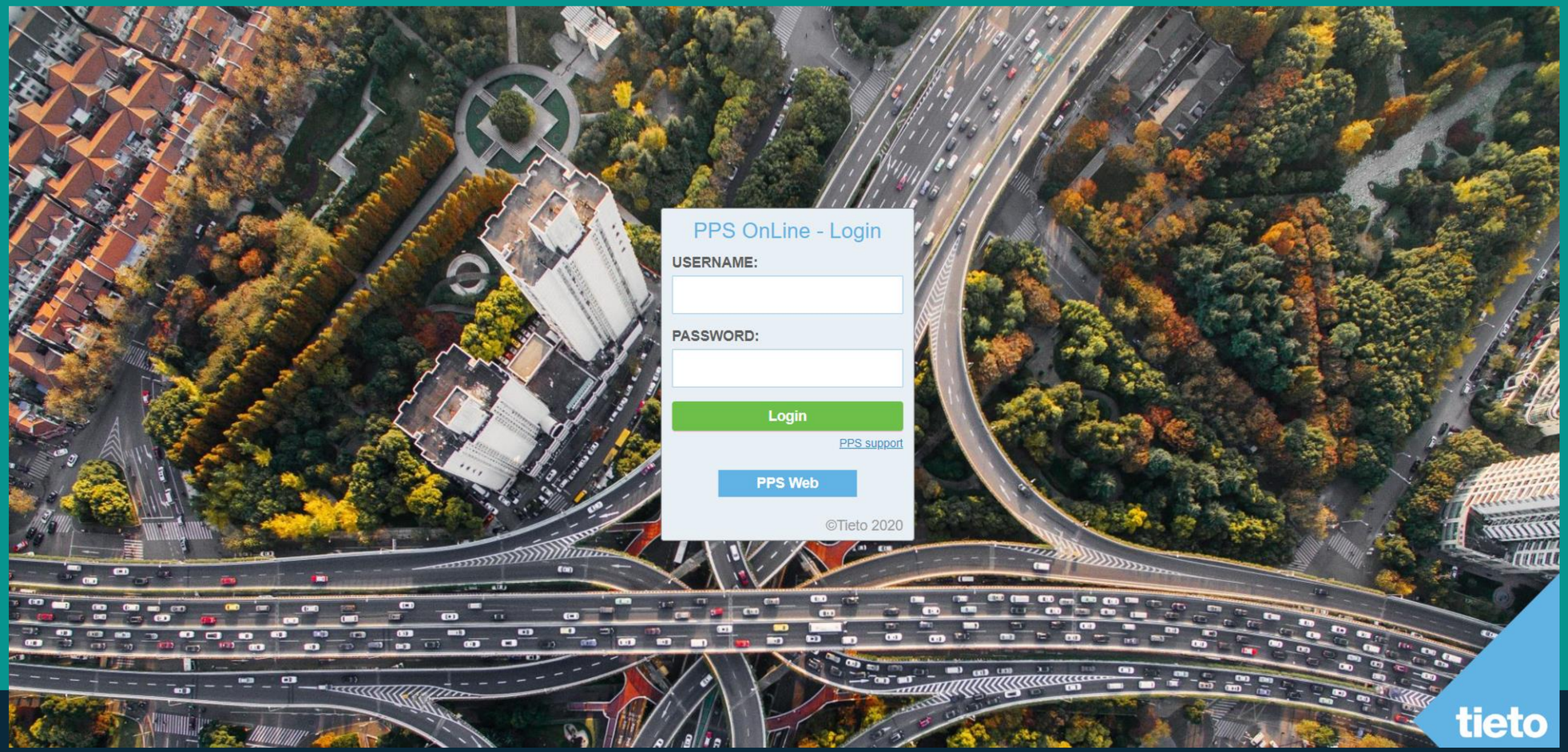
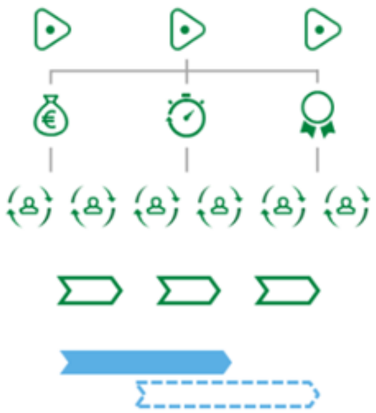
Benefit realisation management *(BRM)* stages

- BRM consists of 3 stages: **EVALUATE - MANAGE – REALISE**
- Practical Project Steering (PPS) by Tieto
  - PPS online: *https://www.ppsonline.se/nordforsk/en/login*

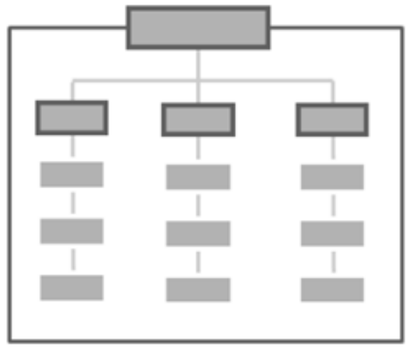


Benefit realisation management *(BRM)* stages

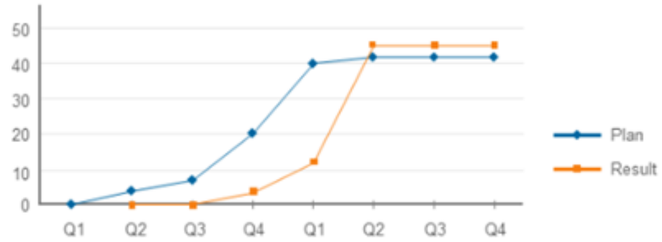
Evaluate - Manage - Realise



Business case
clarify and valuate the expected benefit



Business changes
lead the business change activities



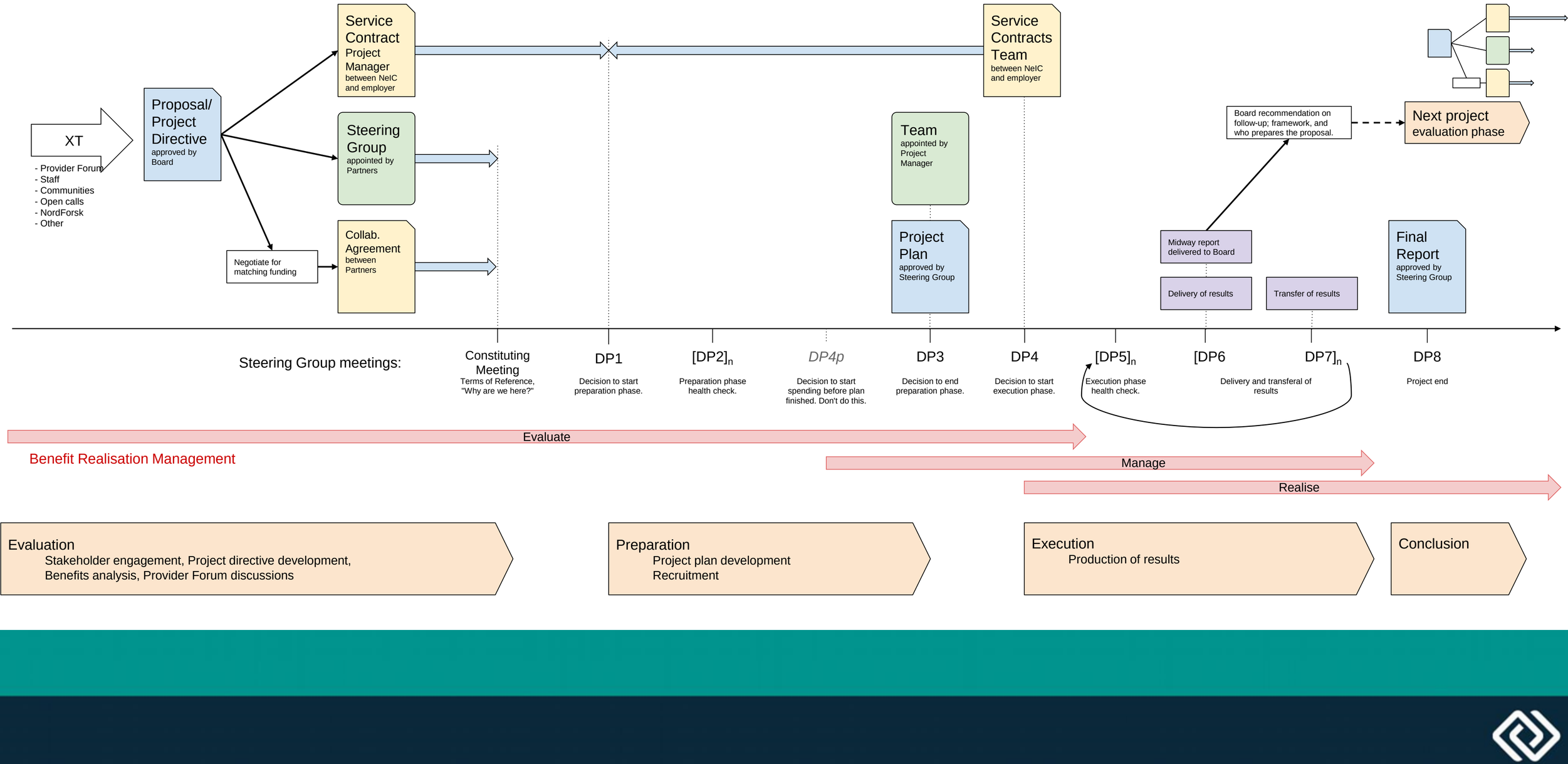
Benefit realisation
monitor and measure the benefits

Evaluate | Manage | Realise

Reference groups
secure acceptance of the result

https://www.ppsonline.se/nordforsk/en/role/skill/full/ah161/4

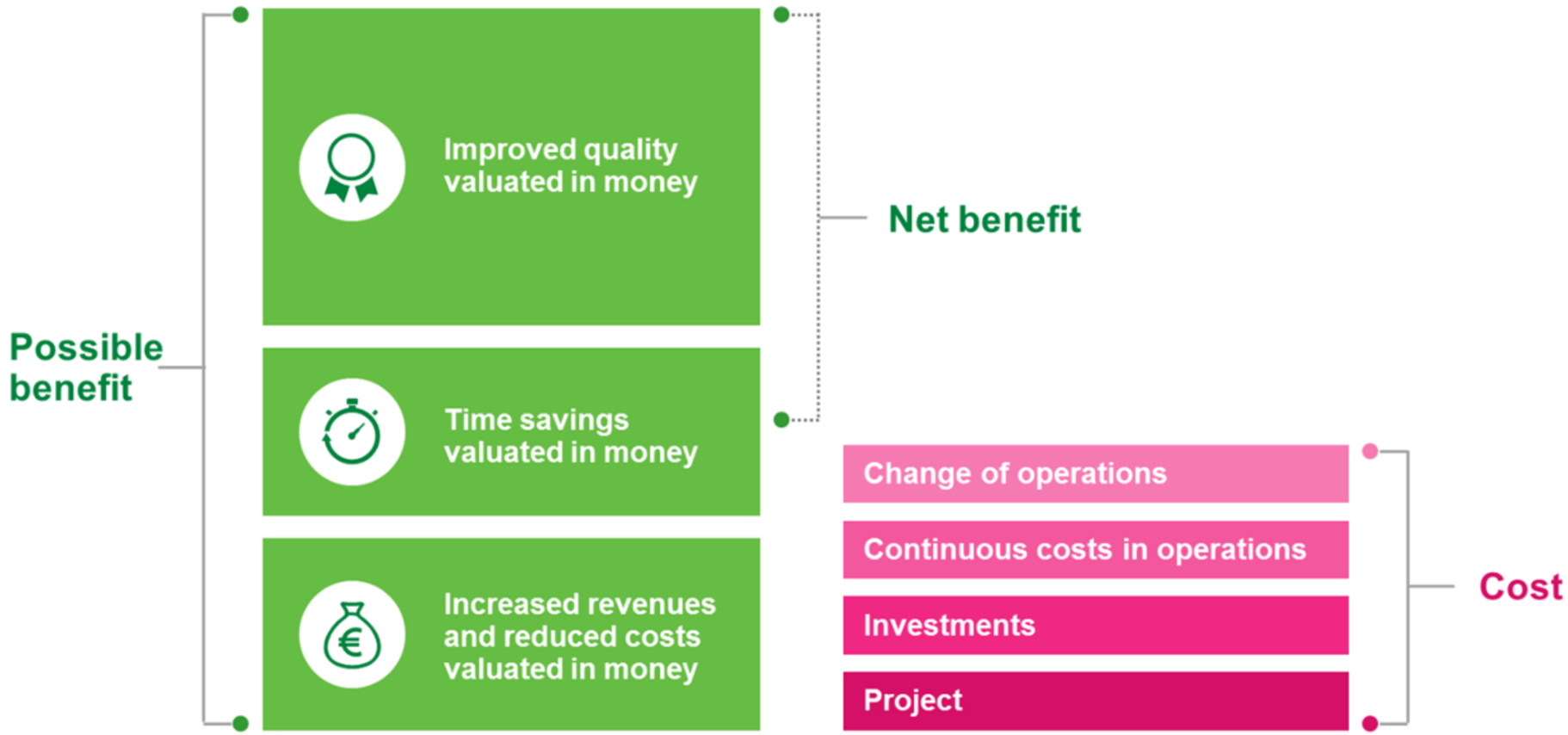
NeIC Project Life Cycle



Project life cycle, benefits and business change

More on Benefits – valuation

Benefit valuation, terminology



https://www.ppsonline.se/nordforsk/en/role/skill/full/ah136/8

More on Benefits: Money and Time

- ***Monetary*** *benefits*
  - Increased revenues or reduced costs valuated in money

- ***Time*** *benefits*
  - Time savings can easily be converted into money
    - Time actually saved must be utilised, in order to create benefit

More on Benefits: Quality

- ***Quality benefits*** are the most difficult to valuate
  - Instead of trying to assess the value of a quality benefit, it is given a value, based on how important it is compared to the money and time benefits
    - Well-composed valuation group can, together, decide how important the quality benefits are in relation to the other benefits
    - This way of valuating provides just as good values as “real” figures

More on Benefits

- Benefit objects
  - *Money*
  - *Time*

  or
  - *Quality*

Tryggve2 example

Benefit object	*Measurable state, including unit*
Consultation and implementation support for cross-border research projects and service providers (use case program)	Number of use cases approved in the project. Number of use cases succesfully completed. User satisfaction. (Q, T)

Project life cycle, benefits and business change

More on Business changes

- *Business change* is defined as a change in the operations

- *Business changes* have no value in themselves but if they are carried out, benefits arise and, in turn, will provide value

More on Business changes:

business changes vs. business changes activities

- *Business changes* are ‘steady’ states
- *Business changes activities* take place for a limited period of time, and bring about business changes

More on Business changes: Tryggve2 example

Business change	*Description*
Enhanced collaboration of sensitive data infrastructure providers	Nordic added value through sharing of tasks, knowledge transfer, pooling competences as well as avoiding duplication of work or incompatible services.

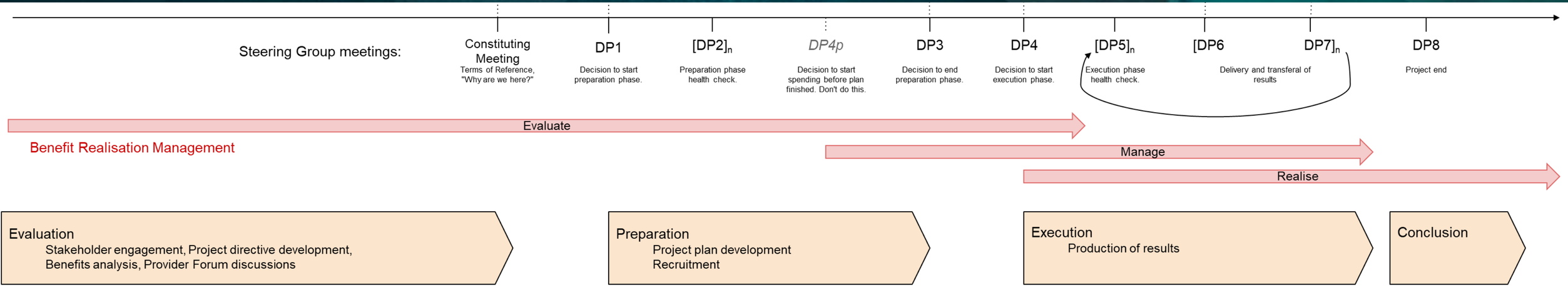
Organisation

- Inside and outside the core project team
  - BRM requires planning and people appointed to both steer and monitor the business changes and to steer the benefit realisation
  - *Orderer*, in this case NeIC, on behalf of all the project partners, is responsible for this
    - However, in order to be successful, it requires commitment and engagement of the *key stakeholders*, especially the project partners

Key responsibilities

- Benefit owners
  - Project partners
  - Stakeholders
  - NeIC

BRM



neic
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Outline

- Benefit realisation management, *BRM*

  Maximising and managing

  - *Evaluate - Manage - Realise*
- Organisation
- Key responsibilities

Evaluate

NORDIC E-INFRASTRUCTURE COLLABORATION

Outline

- Purpose
- Differentiating between outcomes and benefits
- Identifying benefits of real value to all stakeholders
- Effective methods of identification and those to avoid

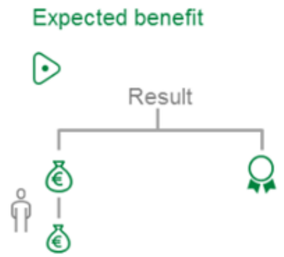
Purpose - Evaluate

- Benefit identification is a part of the evaluation phase for each new project
  - PPS material: https://www.ppsonline.se/nordforsk/en/main/skill/ah163
- Benefit list is created as a part of the business case
  - *Perhaps Provider Forum reviews the business case*

Evaluate & Valuate

Clarify and valuate the expected benefit

The need for establishing support and the complexity determine the amount of work



An uncomplicated situation when

- the orderer can, without any help, identify and valuate the benefits
- other stakeholders can easily understand the value
- the need to establish support and convince stakeholders is not great
- the valuation can be based on simple number facts

A complex situation when

- several stakeholders are needed in order to get a complete picture of the benefits that can be achieved
- support must be established for the assumptions in the estimations
- benefits that are difficult to evaluate in which the values are based on the group's insight and judgement

Remember

The amount of work involved can vary from one person working for a few hours, to an entire group participating in several work meetings

https://www.ppsonline.se/nordforsk/en/role/skill/full/ah161/5

Benefits of real value

- Differentiating between outcomes and benefits

Benefit object	Measurable state, incl unit	Benefit realisation responsible
Competence building in ESGF nodes	Number of trained people in ESGF (Q, $, T)	NICEST partners
ESGF documentation - installation and user manuals	User satisfaction (Q, T)	NICEST partners
User training: use of the models, use of diagnostic tools	User satisfaction (Q)	NICEST partners and other partners
Outreach: more people interested in the field	Number of people interested/attracted to the field ($)	NICEST partners and other partners
Combined achievements supports benefit of research community, i.e., work in other projects, e.g., cmorization professionalizes the user community	Number of people ($, T)	NICEST partners and other partners (e.g. more than 10 in Norway - climate reasearch community)
Community building between partners	People cooperating across borders (Q, $)	NICEST partners and NeIC

- Identifying benefits of real value to all stakeholders
- Effective methods of identification and those to avoid
  - *Provider Forum reviewing the progress*

Manage

NORDIC E-INFRASTRUCTURE COLLABORATION

Outline

- Purpose
- How to develop the Benefits Realisation Plan
- Defining & Scoping required changes
- Defining the measurement plan
- Developing the resistance management plan
- Responsibilities during this and following phases
- Relationship to project life-cycle

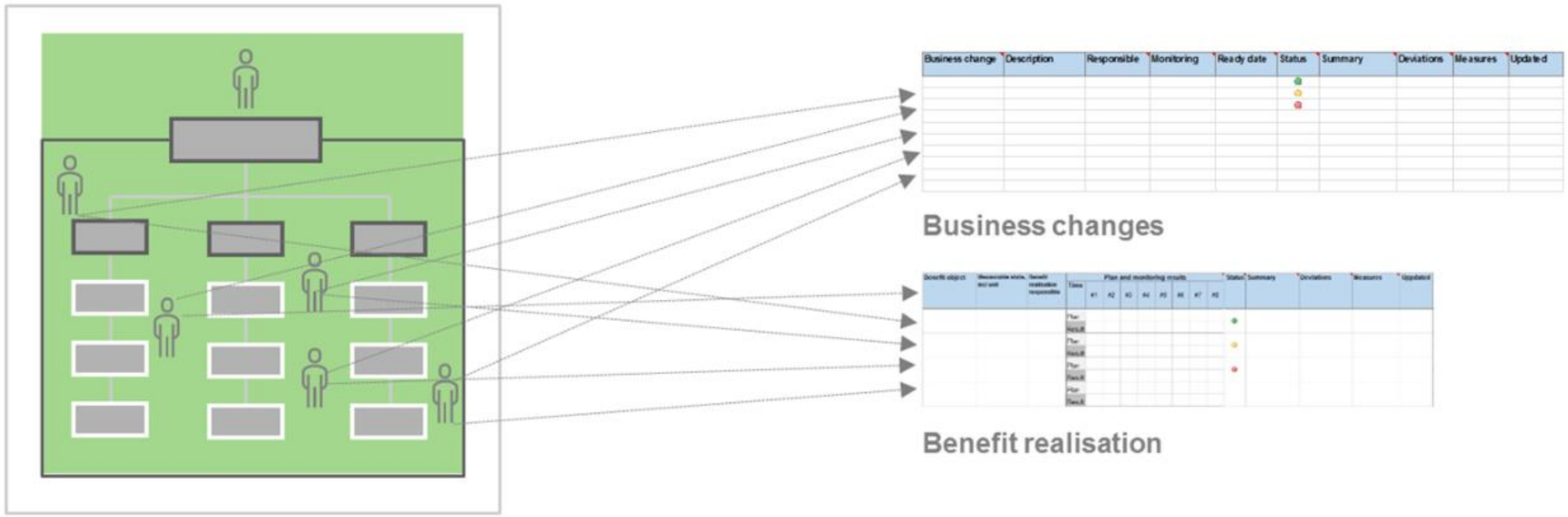
Purpose - Manage

- Primarily during the project execution stage
- Expected benefit is achieved by:
  - *Executing the planned business change activities*
  - *Monitoring changes/deviations*
  - *Measuring the realisation of the benefits*
- The list of benefits is continuously evaluated and updated
- Project owner (PO) together with the project's steering group is in charge

Manage

Monitor and measure benefits

Business changes lead to benefits, so both must be monitored and measured



Delegate monitoring within the organisation

- business changes
- benefit realisation

https://www.ppsonline.se/nordforsk/en/role/skill/full/ah161/9

Benefits Realisation Plan

- How to develop the *Benefits Realisation Plan*
- Defining & Scoping required changes
- Defining the measurement plan
- Developing the resistance management plan

Manage - resistance

Manage resistance

By

- listening to and understanding objections
- focusing on what and not how
- removing obstacles
- offering simple, clear choices and consequences
- creating hope
- showing the advantages in a real and concrete way
- transforming the strongest differences of opinions

Remember

- Understanding why a business change shall be made is a prerequisite for wanting to be part of the change
- That every individual and situation is unique

https://www.ppsonline.se/nordforsk/en/role/skill/full/ah140/5

DeepDive Benefit realisation plan	
Enter document data here:	**Version 0.2, 2020-01-22, responsible: DeepDive / PO**
Purpose	Support for monitoring of benefit realisation and business change activities
	· Provides overall information regarding business changes, planned execution and status
	· Provides overall information regarding benefits, how they are monitored and their status
When it can be used	For monitoring benefits and business changes in connection with aiming for an expected benefit
Those who can use it	Orderers, programme managers
Reference for more information	Skills: Organise business benefit management (AH161), Benefit realisation (AH165), Business benefit management (AH136), Execute change (AH140)
Functionality	
Instructions as to how it works	1. The Business changes tab is used to plan and monitor business changes
	2. The Benefits tab is used to plan and monitor benefits. You can choose between 8 points in time for monitoring. Planned values are entered in the top row and the result in the row below, as the measurements are carried out.
	3. The Graphs tab presents graphs showing the situation for up to 9 benefits. The graphs are updated automatically when data is entered in the Benefits tab

Example: DeepDive

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DeepDive Benefit objects

Benefit object	Measurable state, incl unit	Benefit realisation responsible	Plan and monitoring results									Status	Summary	Deviations	Measures	Uppdated
			Time	#1	#2	#3	#4	#5	#6	#7	#8					
Close collaborations between biodiversity experts	Atlases in place, e.g., Atlas of living Norway, Sweden, Estonia; Taxonomy; AI; PlutoF. Units: Q $ T	Partners and NeIC	Plan	10 - 20								2	FinaInd: LUOMUS Universities Turku,Oulu (FinBIF); Norway, Sweden, Estonia. Input to biodiversity data infrastructure communities (Units: Q T), e.g. PlutoF (http://plutof.ut.ee/), Swedish Artdatabanken (http://artdatabanken.se/), FinBIF (https://laji.fi/en), Nordwegian Artsdatabanken(https://www.artsdatabanken.no/), GBIF and Living Atlases comunity (https://living-atlases.gbif.org/). AI-based analysis of: SE seafloor images from 1993-2020 (Ocean data factory); DK image recognition in the Arktic (beatles + flowers - pollination, effects of cllimate change etc.) Units: Q $ T		DeepDive contribution: 4 ("scale (0 - 5), 0 = no contribution, 5 crucial contribbution")	
			Result													
User training	Number of users trained. (Units: Q, $) Learning outcome: technical skills (github, R, python, interaction with machine . web services, use of Atlases - web services and machine readable interfaces), TensorFlow	DeepDive project group	Plan	10									210 researchers trained. Databases and computantional resources outside the Atlases, but they are linked		4	
			Result	20												
Effective project deliverables distribution	Objectives (deliverables) reached the target audience (Units: Q), Rio database, Affiliate programme	DeepDive SG	Plan										Digital copy of training, in github.		2	
			Result													
High-level impact	Involvement in GBIF. EOSC-Nordic and EOSC-Hub (Units: Q, $). ESFRI infrastructure (DiSSCo, EMBRC ERIC, and LIFEWATCH ERIC); ELIXIR (Units: Q, $) Application to NordForsk (Linked Open Data -> Taxonomic information)	DeepDive partners	Plan										Digitazation of public data (Taxonomy + Catalogue of Life, SE (and IS using SE system), FI and NO), agreement on biodiversity informative sharing (SE, FI and NO), 3 years 1.9 M€		5	
			Result													
Sociatal impact	Influencing decision making (Units: Q T). Climate response. Biodiveristy loss. Land-use planning, alien species alerts, and climate response in Nordic ecosystems based on linked infrastructures with consitent data concepts	DeepDive partners and NeIC	Plan												1	
			Result													
Unified taxonomy	Sharing information across borders (Units: $, T)	DeepDive partners	Plan												3	
			Result													
Cross-border data sharing	PlutoF, findability	DeepDive partners													5	

DeepDive Business changes

Business change	Description	Business change manager	Monitoring	Ready date
Promoting applications	Competitive advantage, e.g., when applying for funding, Data posted leads to publications [peer review papers]	DeepDive SG	Through SG	Continuous process
Enhanced community building	Biodiversity Nordic community better integrated	SG	SG	Dec 2019
Efficient and effective processes	Taxonomy, Validation of the data	SG	SG	Continuous process
Enchanced networking	Global, EU and Nordic level presence	SG	SG	Dec 2019

Responsibilities

- Relationship to project life-cycle
- Responsibilities during this and following phases
  - Main responsible: PO together with the SG
  - *Provider Forum reviewing the progress*

Realise

NORDIC E-INFRASTRUCTURE COLLABORATION

Outline

- Purpose
- Simple and effective 'tools'
- Reviews and responsibilities
- Measuring benefits
- Impacts Analysis

Purpose - Realise

- Ensuring that whatever the project produces continues to create value
- Affiliate programme
  - Provider Forum reviews the benefits

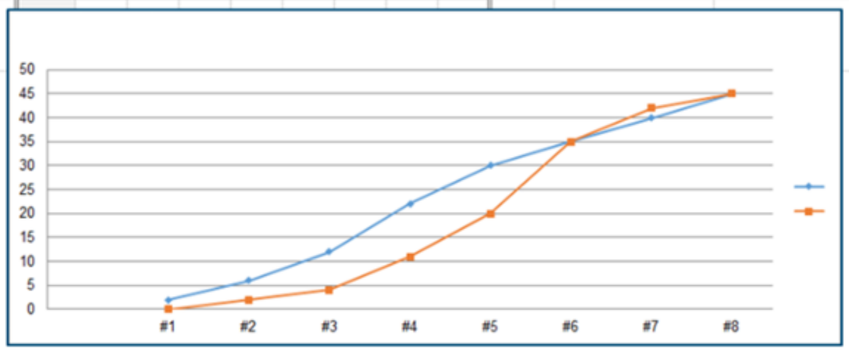
Realise - realisation plan

Benefit realisation plan

Plan for measuring business changes and benefit objects

Business change	Description	Business change manager	Monitoring	Ready date	Status	Summary	Deviations	Measures	Updated

Benefit object	Measurable state, incl unit	Benefit realisation responsible	Plan and monitoring results									Status	Summary	Deviations	Measures	Uppdated
			Time	#1	#2	#3	#4	#5	#6	#7	#8					
			Plan													
			Result													
			Plan													
			Result													
			Plan													
			Result													



https://www.ppsonline.se/nordforsk/en/role/skill/full/ah165/7

Purpose - Realise

- Measuring benefits
- Impacts Analysis
  - *Impacts discussed in regular periods, e.g., yearly*

Backup

NORDIC E-INFRASTRUCTURE COLLABORATION

NLPL Benefit objects (1)

Benefit object	Measurable state, incl unit (Q=quality, $=money, T=time)	Benefit realisation responsible
Virtual laboratory, Close collaborations between the NLPL partners	Agreements in place to continue the project after 2019. Units: Q $ T	SIG, Special Interest Group
Close interactions with user communities	Number of the affiliate/pilot cases/users. Resources matching researchers' needs. Simple, lightweight and appropriately responsive processes. (Q T)	Project Group (PG) -> partially through EOSC-Nordic

NLPL Benefit objects (2)

Benefit object	Measurable state, incl unit (Q=quality, $=money, T=time)	Benefit realisation responsible
User training: usage of NLPL framework/software	Number of users using the NLPL tools/framework. (Q, $). FinCLARIN	PG
Outreach: user interested to use NLPL framework, including users outside Nordics	Winter School for Nordic NLP community (Q, $, T)	SIG
Availability of hardware resources committed to the project by the national providers (including migration Saga, and Puhti)	Number of core-hours/billing units/currency made available to the NLP community (core-hours/BU/Eur) (Q, $, T)	PG (see http://wiki.nlpl.eu/index.php/Infrastructure/resources)

NLPL Benefit objects (3)

Benefit object	Measurable state, incl unit (Q=quality, $=money, T=time)	Benefit realisation responsible
Effective project deliverables distribution	Objectives (deliverables) reached the target audience, e.g., NLP community in the Nordic and above (Q)	Steering Group (through the public project web site: http://www.nlpl.eu)
EOSC-Nordic	EOSC-Nordic use case approved (Q, $)	SIG, NeIC
Increased NeIC visibility	NeIC visibility through NLPL webpage, conference conributions, etc. ($, T)	SIG, NeIC

NLPL Business changes

Business change	Description	Business change manager	Monitoring	Ready date
Community formation enchanced	Winter School, NoDaLiDa Workshop, Successful EOSC Nordic application	PG	SG	Jan 2019
Effective processes	NLP Software installed on Taito and Abel, Puhti and Saga, user support time saved	PG	SG	Dec 2019
EU presence	Invitation into EU consortia, e.g., Barcelona Supercomputing Center	PG	SG	Dec 2019
Advanced Class teaching	Uppsala, Helsinki and Oslo using the virtual laboratory for teaching	PG	SG	Dec 2019