

# Innovative Business Case Management with edison365businesscase



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# Agenda



01.  Why business cases?
02.  Current approach to pre-project pipeline
03.  edison365**businesscase**
04.  Screenshots
05.  Questions
06.  Next steps

# Business cases are *important*

**Organizational success requires correct project prioritisation and an understanding of where benefits are being delivered**  
Companies that fail to manage their pipeline and assess their outcomes will fail to stay competitive



Maximise growth



Expand capabilities



Optimize resource allocation



Deliver better services



Provide for innovation

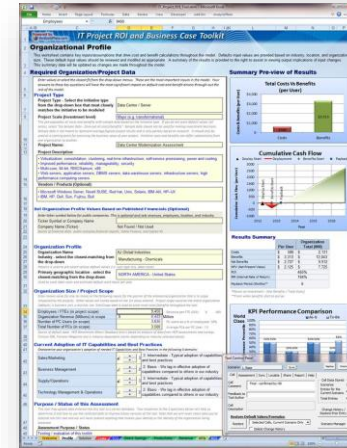


Eliminate inefficiencies

# How do organizations build business cases?

A combination of:

- Excel
- Email
- Collaboration platform
- ERP
- Other



This screenshot displays a document template for a business case, titled 'Business Case Template'. It includes sections for 'Executive Summary', 'Business Need', 'Anticipated Outcomes', 'Justification', and 'Critical success factors'. The 'Executive Summary' section is currently active, showing a structured layout for writing the case. The document is labeled 'PAGE 8 OF 23' at the bottom.

This screenshot shows a 'Job Estimating' software interface. It is divided into several sections: 'General Information' on the left, 'Customer Information' at the top right, and a large 'Production' section at the bottom. The 'Production' section includes a table for 'Quote and Run Quantities' and a detailed 'Cost Breakdown' table. The 'Cost Breakdown' table lists various costs such as 'Total Setup', 'Total Manufacturing Costs', and 'Total Costs' with their respective rates and quantities.



# Current processes are not sufficient



Inconsistent

Poor visibility

Lack of ownership

- Cases are hard to compare and prioritize.
- Approval is slow and difficult to accelerate.
- Benefit assessment is challenging as cases are lost or incomplete.
- This leads to **bad decisions**.

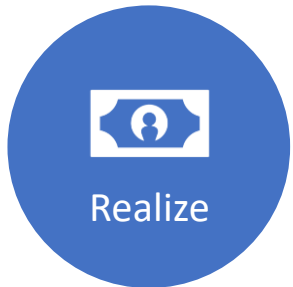
# How edison365**businesscase** helps



Accelerates approval and prioritisation



Ensures accountability



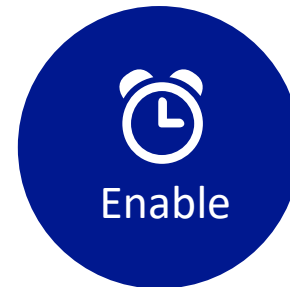
Demonstrates when benefits are realized



Standardizes values and formats



Formally embeds project approval processes



Enables case management anytime & anywhere

# What is edison365?

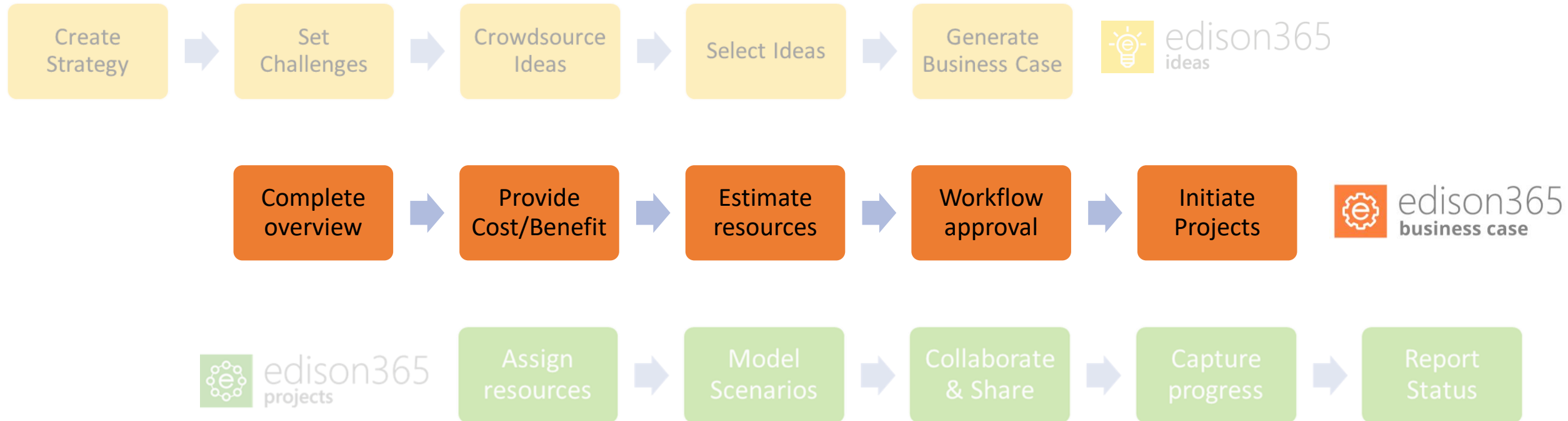


A modular suite of solutions that accelerates business transformation by leveraging existing Microsoft investments.



edison365

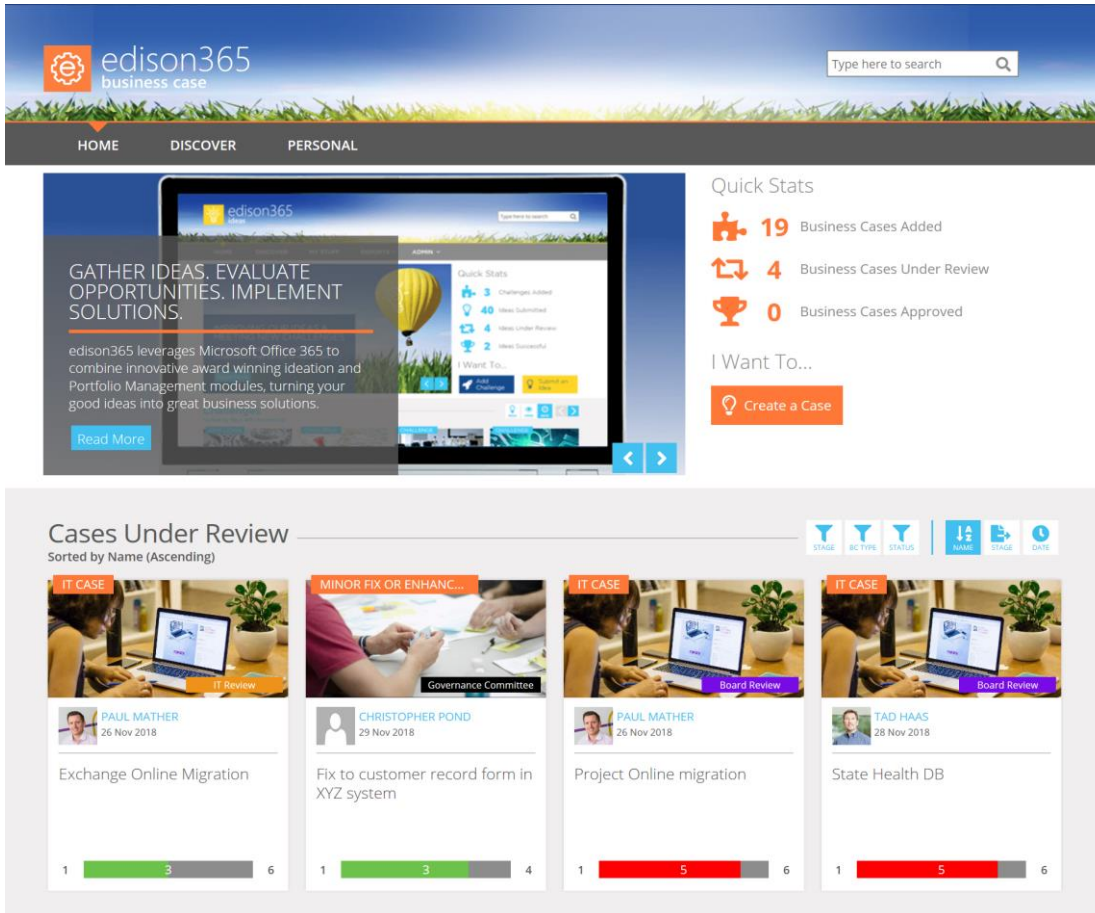
# Edison365**businesscase** ensures realization of benefits



Ideas -> Approval -> Execution -> Value

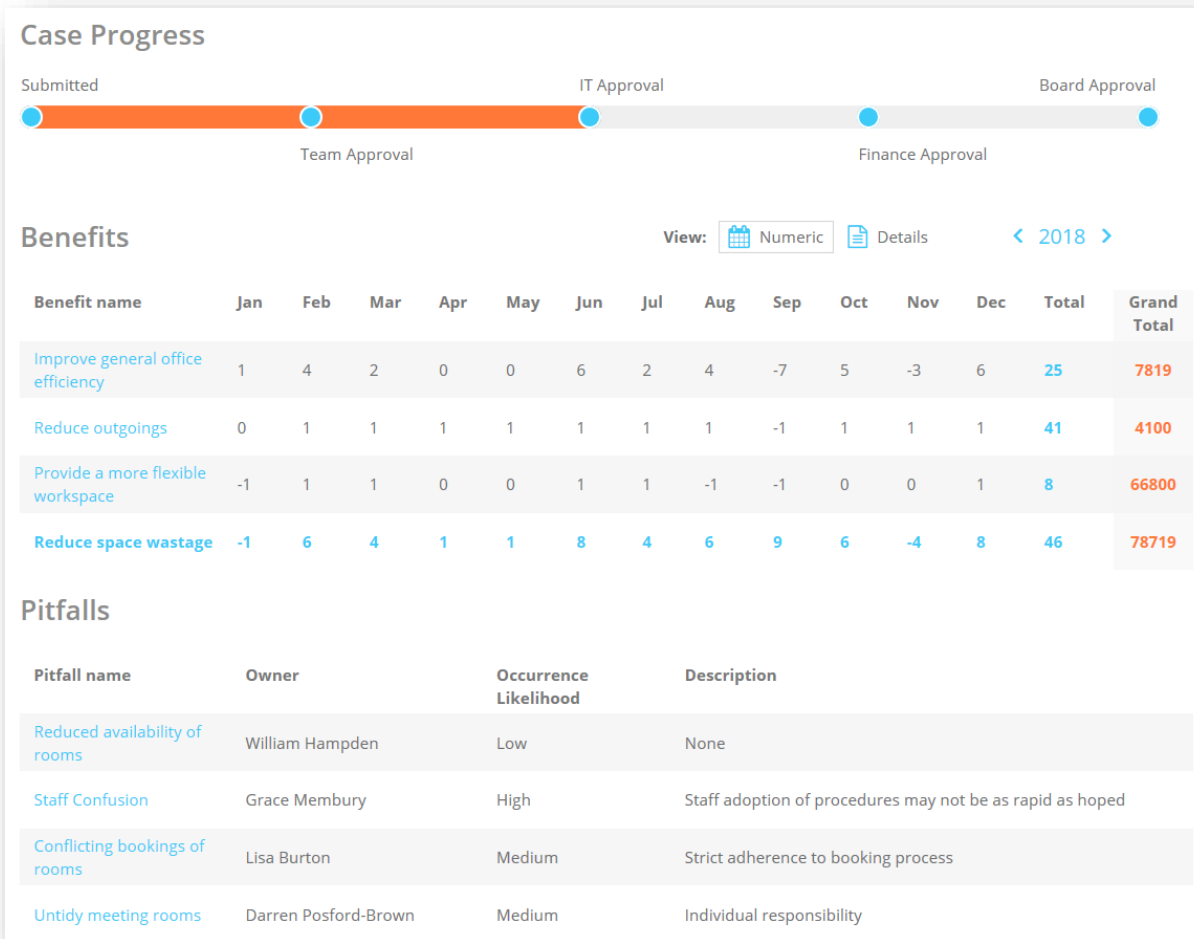


# Intuitive User eXperience



- Card based responsive design
- Touch enabled
- Easily visible KPIs & status
- Rapid adoption
- Integrated with other edison365 modules.

# Repeatable ways of working



- Form based information capture:
  - Benefits
  - Pitfalls
  - Benefits
  - Costs
  - Risks
  - Resources
- Multiple data visualisations
- Varying case templates

# Completely configurable form building

The screenshot displays the 'Form Designer' interface. On the left, a sidebar lists various components categorized under 'Zones', 'Fields', and 'Tables'. The 'Zones' section includes 'Aggregated' (Investment Appraisal), 'Periodic' (Benefits, Costs, Pilot Costs, Resources), 'Standard' (Lessons Learned, Responsibility, Risks, Stakeholders, Steps - Phase 1 through 6), and 'Timescale' (Pilot Timescales, Timescales). The main area is titled 'Form Design' and shows a 'Form Properties' section with 'Label' (Form Label) and 'Internal Name' (Internal Name). Below this is the 'Design Surface' with tabs for 'Overview' and 'Details'. The 'Overview' tab is active, showing a form layout with sections: 'Set Header' (Executive Summary), 'Email' and 'Name' fields, and another 'Set Header' (Pitfalls). The 'Pitfalls' section includes a table with columns: Pitfall Name, Owner, Occurrence Likelihood, and Description. A 'New row' button is visible below the table.

**Form Designer**

Load Form Design

**Zones** | **Fields** | **Tables**

Drag tables onto a zone

**Aggregated**

Investment Appraisal

**Periodic**

Benefits  
Costs  
Pilot Costs  
Resources

**Standard**

Lessons Learned  
Responsibility  
Risks  
Stakeholders  
Steps - Phase 1  
Steps - Phase 2  
Steps - Phase 3  
Steps - Phase 4  
Steps - Phase 5  
Steps - Phase 6

**Timescale**

Pilot Timescales  
Timescales

**Form Design**

**Form Properties**

Label  Internal Name

**Design Surface**

**Overview** | **Details**

**Set Header**

Executive Summary

Email  Name

**Set Header**

Pitfalls

**+ New Item** **Edit Item** **Delete** **Move Down** **Move Up**

Pitfall Name	Owner	Occurrence Likelihood	Description
<a href="#">New row</a>			

- Simply create fields, tables & forms to match existing processes.
- Report across fields & tables at the case, type and portfolio level.
- Drag and drop to build case templates.
- Pre-populate templates with best practice data.

# Total visibility

The screenshot displays the 'edison365 business case' dashboard. At the top, there's a navigation bar with 'HOME' and 'PERSONAL' tabs. Below this, the user profile for 'SAMMY JANKIS', Digital Content Analyst and Strategist, is shown with a 'View company profile' button. To the right, 'My Stats' are listed: 3 Business Cases Owned, 20 Business Cases Managed, 4 Business Cases to Approve, and 2 Business Cases Approved. Below the stats are three tabs: 'Managed Cases' (selected), 'My Business Cases', and 'My Approvals'. The main section is titled 'Cases Requiring Action' and is sorted by Views (Ascending). It contains four cards, each representing a case with a title, a 'Next Approval' status, and a list of approvers with their roles and approval status (indicated by checkmarks or red X's). The cases are: 1. 'Improved operational efficiency across all departments' (Next Approval: Board, Approver: SAMMY JANKIS, Date: 02/08/2017). 2. 'Creating breakout areas in the office reception' (Next Approval: IT, Approver: JANETTE WILLIAMSON, Date: 02/08/2017). 3. 'Maximising our efficiency for meeting room usage' (Next Approval: Team, Approver: JANETTE WILLIAMSON, Date: 02/08/2017). 4. 'Improve web-based security in a centrally manageable way...' (Next Approval: Finance, Approver: JANETTE WILLIAMSON, Date: 02/08/2017). At the bottom, there's a section for 'Cases Awaiting Approval'.

edison365 business case

HOME PERSONAL

**SAMMY JANKIS**  
Digital Content Analyst and Strategist  
[View company profile](#)

**My Stats**

- 3 Business Cases Owned
- 20 Business Cases Managed
- 4 Business Cases to Approve
- 2 Business Cases Approved

Managed Cases My Business Cases My Approvals

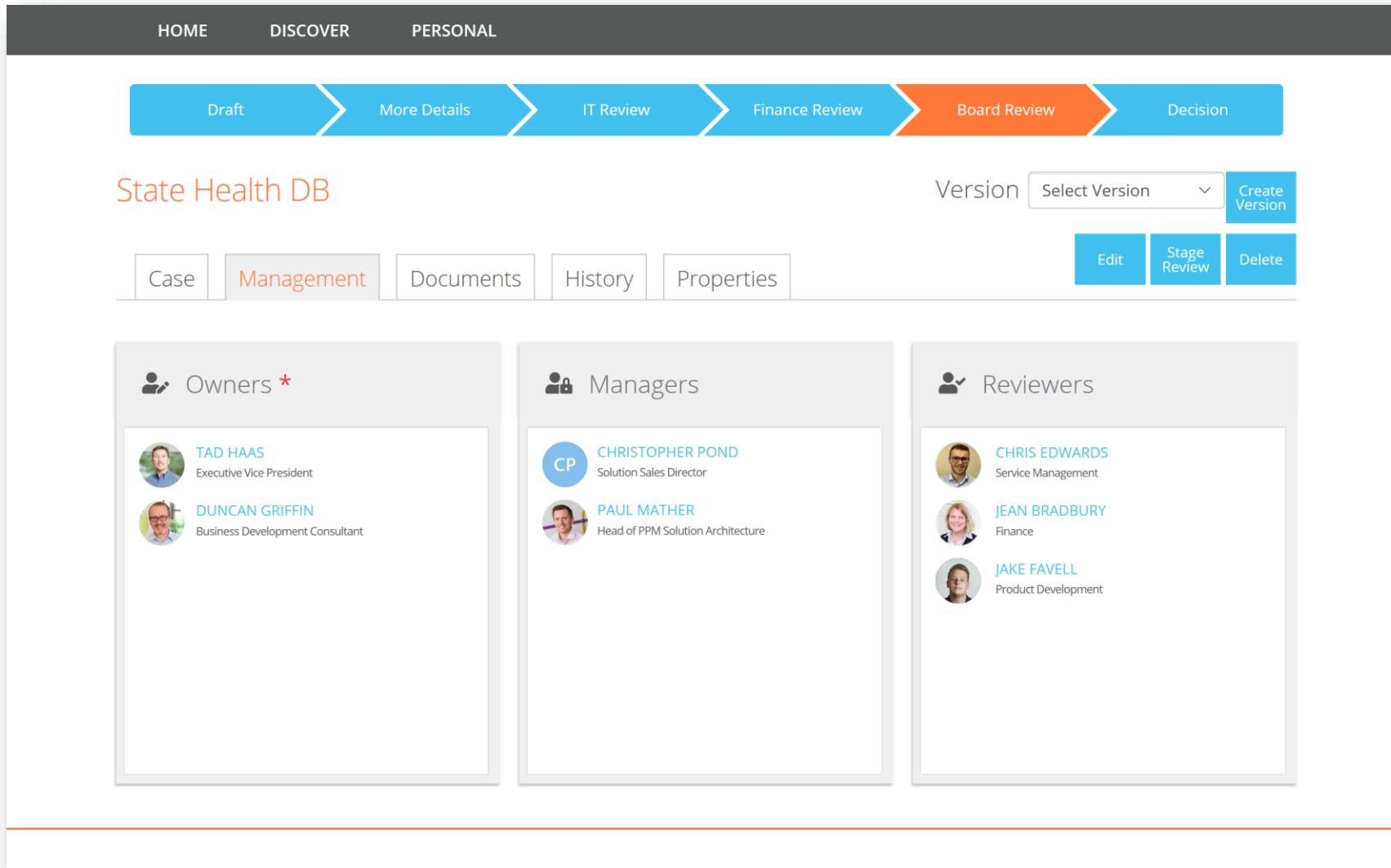
**Cases Requiring Action**  
Sorted by Views (Ascending)

Case Title	Next Approval	Approver	Role	Status	Date
Improved operational efficiency across all departments	Board	SAMMY JANKIS	Digital Content Analyst and Strategist	Approved	02/08/2017
Creating breakout areas in the office reception	IT	JANETTE WILLIAMSON	IT approver	Approved	02/08/2017
Maximising our efficiency for meeting room usage	Team	JANETTE WILLIAMSON	Team Approver	Approved	02/08/2017
Improve web-based security in a centrally manageable way...	Finance	JANETTE WILLIAMSON	Finance Approver	Approved	02/08/2017

**Cases Awaiting Approval**  
Sorted by Views (Ascending)

- View entire case portfolio
- Identify (and resolve) approval bottlenecks
- Easily understand personal tasks and timescales

# Case review actions linked to O365 accounts




HOME DISCOVER PERSONAL



Draft > More Details > IT Review > Finance Review > **Board Review** > Decision


State Health DB



Version  [Create Version](#)


[Case](#) [Management](#) [Documents](#) [History](#) [Properties](#) [Edit](#) [Stage Review](#) [Delete](#)




 **Owners \***

-  **TAD HAAS**  
Executive Vice President
-  **DUNCAN GRIFFIN**  
Business Development Consultant

 **Managers**

-  **CHRISTOPHER POND**  
Solution Sales Director
-  **PAUL MATHER**  
Head of PPM Solution Architecture

 **Reviewers**

-  **CHRIS EDWARDS**  
Service Management
-  **JEAN BRADBURY**  
Finance
-  **JAKE FAVELL**  
Product Development

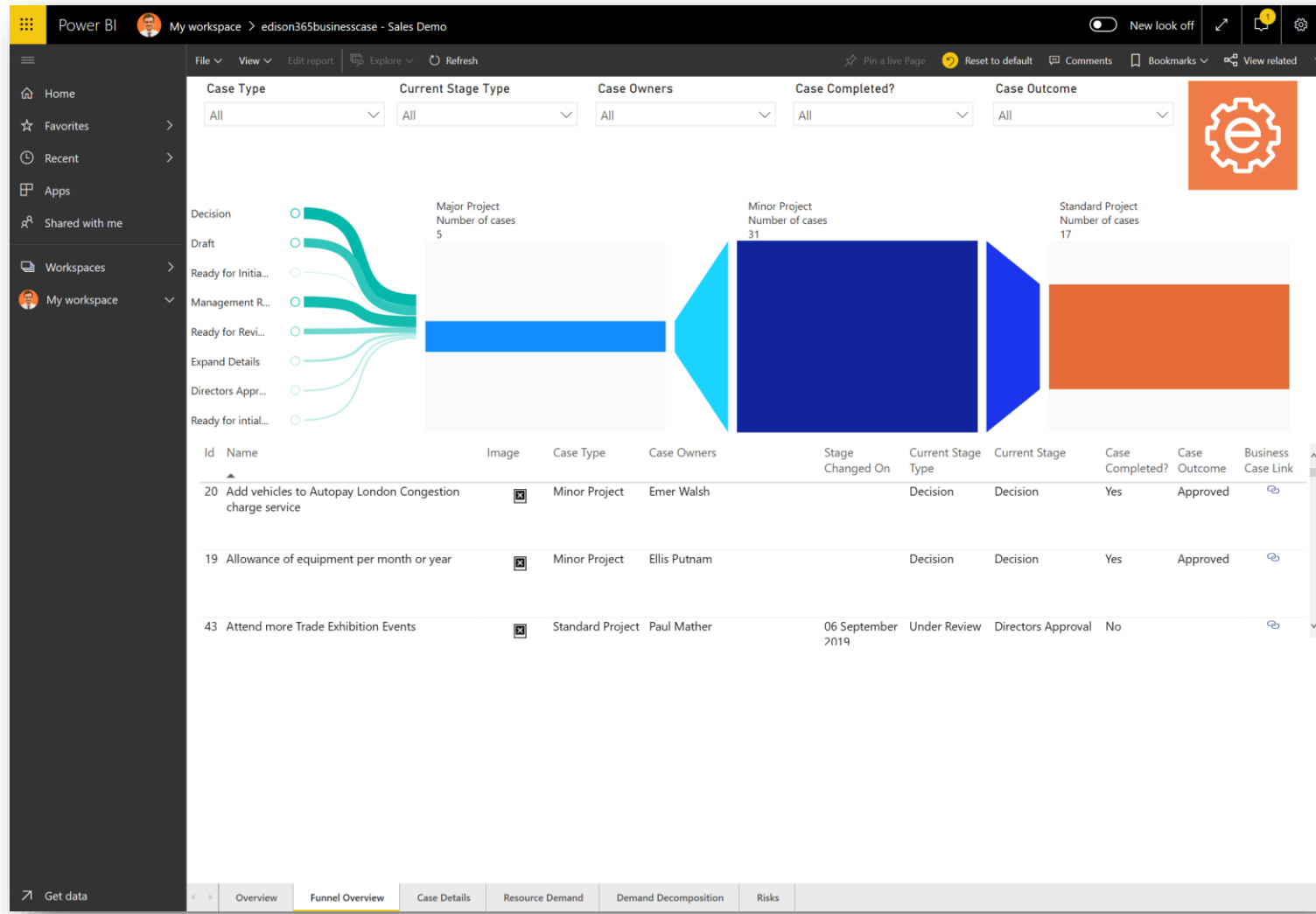


# Full Teams integration

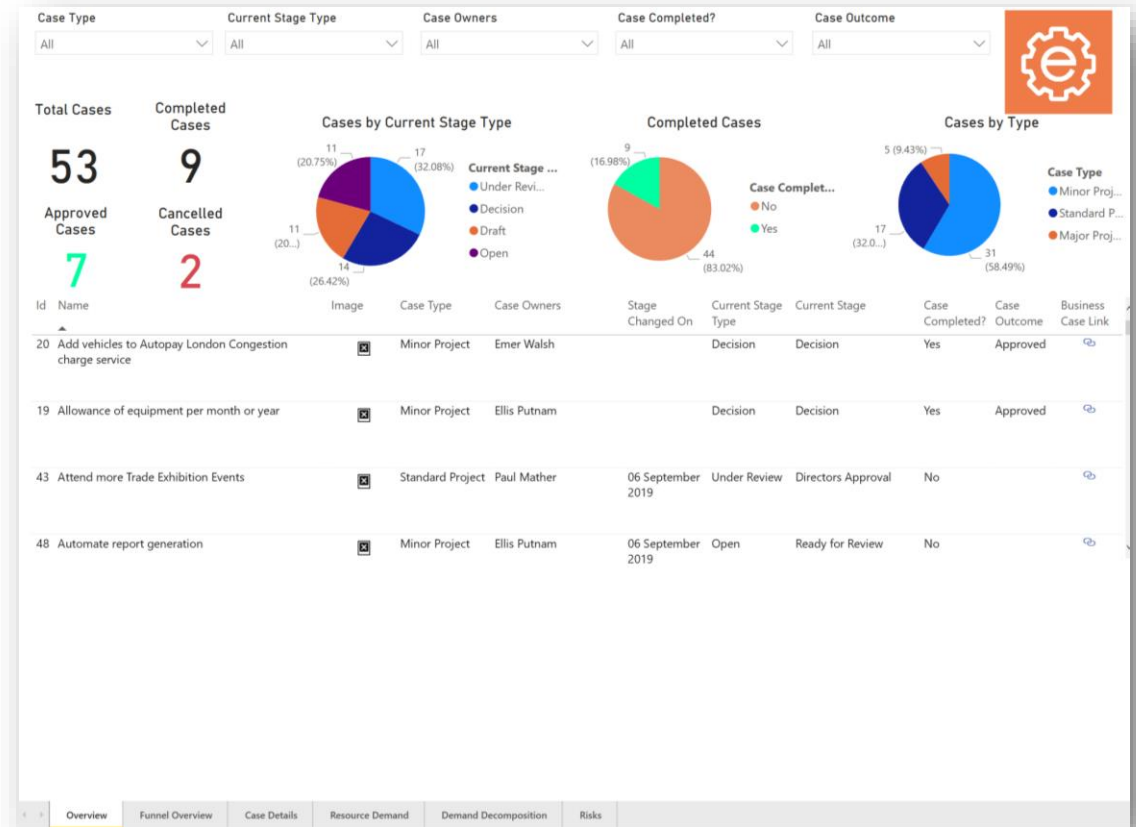
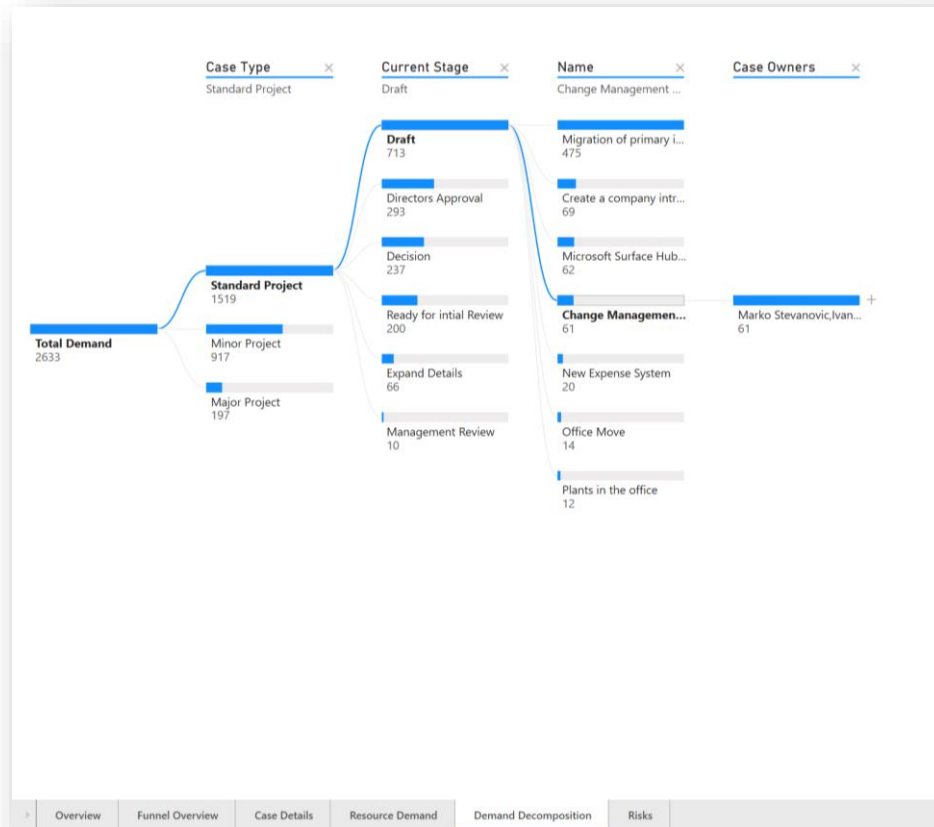
The screenshot displays the Edison365 Teams integration interface. On the left is a sidebar with navigation options: Activity, Chat, Teams, Calendar, and Files. The 'Teams' section is expanded, showing a list of teams including 'Innovative-e e365 Partnership Hub', 'Learn about Teams', 'General', 'Urgent demo', '1 hidden channel', 'CPS tour de force', 'CPS edison365 Partnership Hub', 'Edison365 Marketing Team - Company', 'Aung & edison365', 'Special Interest Groups', 'IAM Client Engagement', 'Innovation Hub', 'Employee voice', 'Environment', 'New Products', 'Reduce queues', 'improve our 2019 living room products', 'Finance Team', and 'Hidden teams'. The main content area is titled 'Innovation Hub > Environment' and contains several reports:

- Executive Summary:** A recent State mandate and constituent demand require near-term IT response. This can either be let internally from IT ops or 3rd party. Current research suggest we have the skill set and interest in executing directly. Partially as this effort can have significant care-over for other agencies facing a similar problem AND it allows STATE IT do enhance skill sets for Azure rapid prototyping, security and deployment. Aside from saving significant admin processing time today, mere access to this critical data is expected to positively impact and potentially save lives.
- Benefits:** A table showing benefits over time from January to December, with a 'Total' and 'Grand' column. The table is viewable in 'Periodic' or 'Details' mode for the year 2018.
- Pitfalls:** A table listing pitfalls, including 'Poor admin adoption' by 'Christop...' with a 'Low' occurrence likelihood.
- Timescales:** A timeline view showing tasks and their start dates from 2017 to 2020. Tasks include 'Business case routing / approval', 'P1 funding approved', 'Architectural design start', 'Design Review', 'MVP coding', and 'Testing'.
- Costs:** A table showing costs over time from January to December, with a 'Total' and 'Grand' column. The table is viewable in 'Periodic' or 'Details' mode for the year 2018.

# Portfolio, type & case level interactive reporting



# Portfolio, type & case level interactive reporting



# Questions



# Next steps

- Demonstration & Q&A for department heads
- Select a team for pilot
- Start building cases and accelerating transformation.

A complete demand management solution that empower your business to make the right decisions



Fully configurable



Ensured accountability



Standardized



Secure



edison365  
businesscase



# Contact Information



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