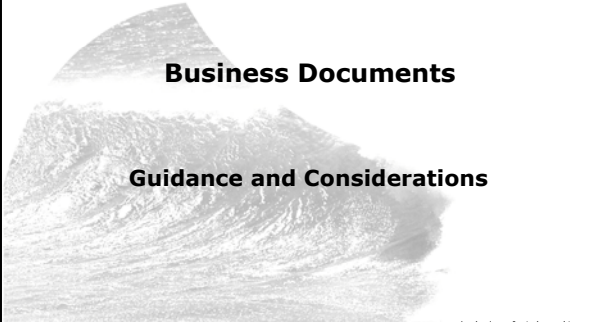


# Business Documents

## Guidance and Considerations



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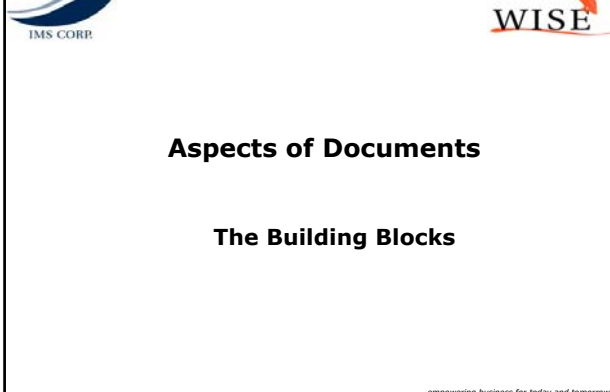
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# Aspects of Documents

## The Building Blocks



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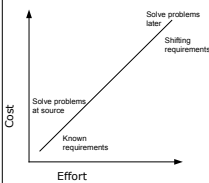
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# Key Elements for Documentation

- Who is audience?
- Why they will read?
- What is its purpose?
- What you want reader to do?
- Planning the document
- Peer Review
- Sign-off
- Assessment criteria
- People NOT read all of document or in order



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## Common Elements

- Executive Summary
  - Structure
- List of Recommendations
  - Referenced documents
- Table of Contents
  - List of Contents
  - List of Figures
  - List of Tables
- Introduction
  - Purpose
  - Audience
  - Scope
  - Exclusions
- Background
- Respective Sections
- Appendices
- Document Control
  - Distribution list
  - Revisions
  - Other metadata




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## Common Requirements

- Each of the major sections of the document is designed to stand alone within the overall document
- Focus on the issues and use brevity (spell out and minimise acronyms)
- A clean simple and minimalist approach is best
- Document should address critical issues only
- Make use of diagrams, tables and bullet points
- To be easily read in a time of stress (font size, style and colour)
- Ease of detaching elements of document
- Branded for the relevant business in line with standard guidelines
- Pages clearly numbered
- Date on the document of when last edited
- Written in English with correct grammar and spelling
- Place supporting information and detail in stand-alone appendices




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## Structure of Business Document

### Getting the Message Across

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# Business Case

- **Justifies why you are going to do something**
- Summary - Erudite with pith
- Objective - State objectives of the proposal
- Outcomes - Detail expected outcomes
- Proposal - Summarise what is proposed
- Return on Investment - State ROI
- Justification - List justifications
- Risk - Summarise key risks




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# Business Plan

- **Details how you are going to do something**
- Business Summary
  - Objective
  - Strategy
  - Outcomes
  - Proposed Implementation
  - Return on Investment (ROI)
  - Justification
  - Timeframes
  - Governance
- Details of Proposition
- Budget & Resources
  - Implementation
  - Ongoing
  - CAPEX
  - OPEX
- Risk
  - Opportunity
  - Implementation
  - Operational
  - Recovery Position
  - Exit Strategy
- Appendices




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# Marketing Plan

- **Details what is your value**
- Business case with a different focus
- SWOT analysis
  - Strengths: where are you strong in the market
  - Weaknesses: where are you weak in the market
  - Opportunities: what are the market opportunities
  - Threats: what are the threats to you in the market




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# Sales Plan

- **Details how you will present your value**
- Business plan with a different focus
- Market Segmentation
  - Segment - detail the Segment
  - Value proposition - the value proposition for the Segment
  - Objective - the goals, objectives and targets
  - Strategy - the strategy to be used in that Segment
  - Activities - detail on how to target that Segment



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# Structure of Business Document

## Purchasing and Servicing



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# Request for Information / Service

- What does customer want to achieve?
- Customers know they need a solution but NOT what the solution is
- A statement of things that are needed
- Asking you to paint them a picture (road map)
- Expect you to show them new and better ways
- Looking for you to improve their business
- Priorities / Issues / Hot spots



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# Request for Purchase

- Know what they want to purchase
- Looking for best value proposition
- Points of difference and value
- Priorities / Issues / Hot spots
- Getting them to agree to the next step




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# Request - Details

- Invitation
  - Schedule
  - Liability
  - Standards
  - Compliance
  - Response outline
  - Key requirements
  - Assessment criteria
- Terms and conditions
  - Questions
  - Lodgement details
- Alteration etc.
- Eligibility
- Non-compliance
- Ownership
- Rights and responsibilities
- Social obligations
- Summary of requirements
- Background
  - About company
  - Site details
  - Staff numbers and needs
  - Future directions




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# Request - Details

- Current environment
  - Overall description
  - Site specific
  - Standards
  - Compliance & regulatory
- Support & Services
  - Process, policies & procedures
  - Asset management
  - Monitoring & reporting
  - Fault management
  - Documentation
- Training
- Billing
- Additional services
- Disposal
- New, replacement, upgrades
- Testing
- Change request & control
- Escalation process
- Summary of responsibilities




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## Request - Details

WISE

- Implementation
  - Responsibilities
  - Process, policies & procedures
  - Asset management
  - Documentation
  - Naming conventions
  - Services to site
  - Audit
  - Testing
  - Purchase
  - Disposal
  - Remediation
- Training
- Post implementation
- Additional services
- Change request & control
- Escalation process
- Company requirements
- Business requirements
- Technical requirements
- Development requirements
- Environment requirements
- Safety & Security
- Special requirements



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WISE

## Structure of Business Document

### Service Level Agreements - SLAs

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## Points for Successful SLAs

WISE

- View from user perspective across silos
- Management to outcomes
- Recognition of behaviours required
- Reward frameworks
- Penalties commensurate with business impact
- Out of scope service management
- Exceptions management
- Quality of hand-off issues



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## Purpose and Application of Documents

### A Common Framework

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## Objective

- A statement of what you want to achieve
- Clear & concise statement
- Quantify if possible
- Time frame for obtaining
- Realistic & achievable



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## Strategy

- Overarching statement on the approach to use to realise the objective
- One or two strategies to realise an objective
- Eliminates options
- Pragmatic, practical & robust
- Have an owner & timeframe



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# Business Drivers Define Strategy

- View as customer interacts
- Holistic approach
- What are the strategic market trends?
- What significant legislative changes are expected?
- Phased implementation




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# Plan

- How the strategy is to be achieved
- What steps are to be taken (activity details)
- Outcomes
- Cost and resources
- Risk
- Justification / ROI
- Practical, realistic and pragmatic




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# Aspects of Plans

- NOT the plan that matters, it's the process
- Think about issues
- Mechanism for coordination & communication
- Build the infrastructure you need so that you can pick up and use as required
- Provide a framework for achieving outcomes
- Tool for skilling, testing and training
- A plan and NOT a budget




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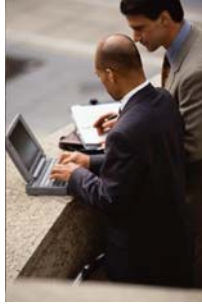
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# Moving Forward

- Take most difficult area
- Break out into issues
- Initial focused piece of work
- Control scope, impacts and dependencies
- Outcomes and expectations
- Skill and expertise transfer
- Road map next step



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# Questions



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