Case for Action

Introduction

Description: A Case for Action should be done to help synthesize the major artifacts, lessons, and recommendations for next steps after an EA engagement. This artifacts summarizes what has been learned / accomplished in the engagement, and helps stakeholders organize/move to deliver on the outcomes identified in the engagement.

Goals: Provide decision-makers and other stakeholders in your EA engagement with a comprehensive representation of the current state and recommendations for next steps.

Context: To improve an identified capability.

Scope: It has broad applicability, but the depth and detail in the document would likely vary with scope of the need addressed. The tool supplements a project charter or program charter (depending on the scope).

Source: Examples provided by Jenni Laughlin, University of Washington

Scenarios

- 1. Summarize work to date and share recommendations on next steps the business can take.
- 2. Build consensus on what was accomplished in an EA engagement and what the next steps are.
- 3. From governance perspective, to justify funding of next steps / recommendations.

Creators:

- Architects in the discovery effort (may include solutions architect, information architect, etc)
- · Business Analyst
- Sponsor/champion

Consumers

- All stakeholders. The presentation may need to be tailored to specific audiences, but the core
 material should generally apply.
 - Sponsors, Business Owners, Architecture and/or Portfolio Review Boards, Subject Matter Experts, Service Owners, Line of Business People, Technology owners

Method

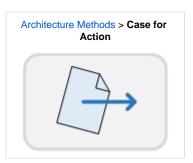
Roles: Architects should facilitate and author this.

Steps:

- 1. Pre-condition: Analysis is nearing completion and is ready to be summarized.
- Pre-condition: Stakeholders have gone through norming process about the as-is, to-be, and initial roadmap draft.
- Gather artifacts and determine which can be applied as is and which should be tailored for publication
- 4. Author introductionto create a narrative context and frame
- 5. Present roadmap
- 6. Outline justification for roadmap
- 7. Construct a recommendation on the immediate next steps / recommendations.
- 8. Optionally present as a business case with resource estimates and cost/benefit

Templates: The following list, which is excerpted from the table of contents of a U. Wash document, illustrates the structure of this tool and drives the method.

- Table of Contents
- Summary and Roadmap
- Challenges and Opportunities
 - Current Examples
 - Example: A
 - Example: B
 - Example: C
 - Example: D
 - Examples in Other Organizations
 - Example: Facility-Related Asset Information at Other Universities
 - Example: UW Policy Directory
- Justification



Links

 Add links to references, articles, examples, etc.

Contributors

Want to help with this page? Please see the Method Contributor Guide.

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- Benefits to customers (students, staff, faculty)
- Savings at Other Universities
- Risk of not doing this (compliance)
- Associated risks
- Recommendations
 - Start a program
 - Identify Stakeholders from Organizations Across the Facility Lifecycle
 - Form an Information Management Steering Group
 - Example Initiatives

Communication

Examples

At University of Washington, we did something similar to help our business partners in Facilities define the lifecycle of building-related documentation, create a roadmap, and launch a technology initiative:

 https://docs.google.com/document/d/1oEP2Rolcx1g-ULk-T9i3SHiQGNBFsU75992EAml2gHQ /edit

We also did something similar to help launch the Admissions Modernization effort at the University of Washington:

 https://docs.google.com/document/d/1Go90kEzlyr_eyw7VjXjlmkHxpn3-0zxkH3eXj5Sx0zY /edit#heading=h.res6p4txva7m

Related Methods

After this method, it could be relevant to proceed to:

- Project charter
- Possibly business case

Before this method, it could be helpful to use

- Roadmaps
- Capability Maps
- Process Maps
- Semantic Data Models
- Pace Layers
- Dot Diagrams
- TIME Models