AIG ACTIONABLE INTELLIGENCE GROUP
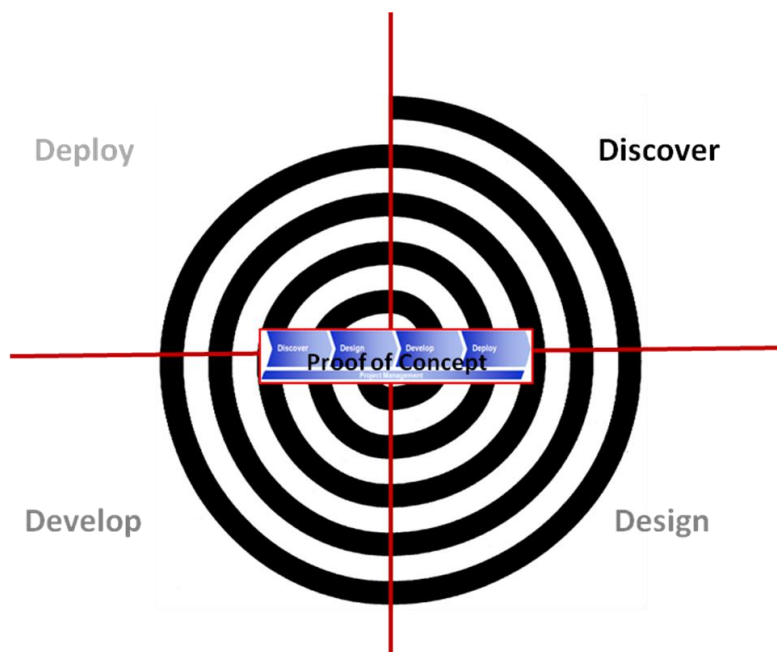
PROOF OF CONCEPT

Turning Intelligence into action

Proof of Value

A Proof of Concept, or Proof of Value, project is specifically designed to ensure early and absolute clarity around the likely Business Value of using a User-centered design to improve the speed, quality and effectiveness of both strategic and operational decision making.

It enables a client to enjoy the following benefits:

- Validate the operational usability of a business solution by means of a sponsor-nominated team of up to six end-users, consistently participating in 7-8 weekly meetings of 2-3 hours each, over no more than a 10 week period

- Ensure clarity of the definitions and usage of specific Key Performance Indicators (KPIs), which are tied to the underlying information and metrics

- Identify the specific data sources from which information must be acquired, and confirm that this information can be readily accessed and provided to users within timeframes that are consistent with the business value proposition

- Enable the Proof of Value User Team to validate the agreed KPIs, which are basic building blocks of the Actionable Intelligence Group's Visual methodology

- Enable confirmation that the representation and mode of delivery of the proposed KPIs provide the necessary insights to make effective decisions

- Build clear end-user consensus around the most effective way to display the information

We will provide a set of clear deliverables as part of the Proof of Concept:

- A web-based 'demonstration system', showing simulated, but realistic and representative data, and enabling the sharing and evaluation of the designs produced during the Proof of Value. This web-based collection of pre-defined story-boards enables the client sponsors to Log into the proposed application from their Web browser and select the information set they wish to view, sufficient to be clear that the approach corresponds to their expectations..

- An introductory meeting with the project sponsor to formally initiate the POC, to establish the primary business objectives, and select team members

- A concluding meeting with the project sponsor, which includes the nominated team members, to report on the final outcome of the Proof of Concept, and the associated value.

- A series of weekly booklets describing the content and use of the screens developed for each iteration of the POC, building to a complete audit trail of the process, and representing an 'animated requirements document'. POC members can use these booklets to note their comments and ideas for input to the subsequent session so as to maximize progress.

- A Glossary of terms describing the KPIs, their usage, and linkages to underlying data and metrics

- Description of the required source data, a dataflow diagram and evolving logical data model

- Navigational structures, showing linkages both between KPI's and, where required, to external systems

- Documented observations around significant patterns of information that are typically inferred by users, as they become increasingly familiar and comfortable with the application and which in turn support the underlying business value proposition.

Based on the establishment of clear confirmation of the success criteria agreed at the commencement of the project, Actionable Intelligence Group is confident that a firm 'go'/'no-go' conclusion to the POC can be achieved within no more than a ten week period, starting with a kick-off meeting with the project sponsor, to sign-off by the User team.

A POC is most effective when the scope is narrow enough to meet the timelines. Speedy success then becomes the foundation for subsequent POC's, each focused on a specific domain area.

Prototyping & Integration

In parallel with the Proof of Value, Actionable Intelligence Group also proposes that there be a Prototyping & Integration project to confirm that the necessary data exists, and establish that all, or most, of this data can be made available to the proposed application.

The POC will also determine the architecture of the systems interfaces, and identify how role-based expectations can be determined and utilized by the proposed application.

Deliverables include:

- Defining and designing the final displays and reports
- Developing any required data connectors to link to operational systems, selecting a data delivery mechanism, and creating and testing data feeds
- Deploying and testing the first, installation, configuration and administration of the proposed application.

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Process & Schedule

A Proof of Value commence typically comprises 7-8 weekly sessions, each lasting 2-3 hours

The following is a high-level view of proposed timeline and weekly activities and objectives for conducting this important phase.

- **Week 1. Proof of Value kick-off with the client sponsor.** This Includes:
  - Nomination of up to six representative users by the project sponsor. This is a critical element, as the nominated user team drive usability, and – as familiarity with the methodology grows – they become 'champions' to their peers.
    - *The time commitment for each user over the life of the Proof of Value will not exceed 24 hours in total*
  - Confirmation of the business objective(s) and identification of up to ten associated KPIs
  - Sponsor expectations of the potential operational improvements that can be achieved, and a working assumption about the business value of these improvements
  - Agreement as to the key success criteria that would support a subsequent decision to proceed to full deployment

- **Week 2. Proof of Value Discovery Session.** To occur on-site at a nominated client location. This on-site meeting with the nominated user team is to ensure that :
  - The user team understand their key 'ownership' role in the process
  - Educate team members in the essentials of the visual methodology
  - Demonstrate relevant and representative illustrations of KPI representation
  - Highlight examples of the range of observations that are typically inferred from KPI representations, as comfort and familiarity with the methodology grows.
  - User confirmation of the KPIs that the team believe (at that point) are required to realize the project objectives
  - Initial suggestions and ideas as to how best design the displays and associated cross-linkages for optimum usability

- **Week 3. First Proof of Value Session (POCS-1).**

  o The user team is shown initial screen designs, based on the KPIs they confirmed, and how those displays can be navigated to linked displays at a more granular level.

  o Sample data is created by the team, with assistance from FYI, to drive scenarios illustrating potential interactions between the KPIs, to re-enforce learning and familiarization with the users, and to continuously validate that the sample data used is representative of expected actual data

  o The actions that users may take as a result of the illustrative scenarios are noted, as it is these actions that directly drive expected business value.

  o Identification of the operational systems that are the sources of data used is also addressed

  o The Glossary of terms is initially populated

  o Any immediate concerns or potential roadblocks raised by team members are noted.

- **Week 4. Second Proof of Value Session (POCS-2)**

  o The user team are given a booklet with screenshots of revised screens, and an associated set of notes, based on the previous session. Confidence begins to grow amongst the team that their requirements are reflected quickly and accurately in the revised version.

  o Familiarization is re-enforced, and new ideas as to how to improve the overall usability and effectiveness of the POC are raised for consideration and agreement by the team.

    ▪ *The POC scope is always carefully bounded by constraints of time, cost, number of KPIs and consistency with the primary project objectives, but potential extensions and additional capabilities that could be included in a subsequent production system are carefully documented as 'future requirements'*

- **Week 5. Third Proof of Value Session (POCS-3)**

  o Similar to POCS-2, but with relatively more attention focused on ensuring user scenarios and observations are captured, and associated benefits noted.

Week 6. Fourth Proof of Value Session (POCS-4)

- o Similar to POCS-2 and POCS-3, but with relatively greater focus on ensuring all required source data has been fully identified, together with the associated systems that provide it

- o 'Time to value' is discussed.

  - *E.g. what is the relative value of information that is intra-hour vs. intra-day, or intra-week?*

  - *If some KPIs change more frequently than others, does that also change the relative value of a given dataset?*

  - *What additional actions could be taken if data were available sooner, or if related history or secondary data were accessible from a drill-down?*

  - *The goal is not to extend the scope of the POC, but to ensure that the maximum potential is extracted from the process.*

- o The Glossary of terms is finalized

- **Week 7. Fifth and final Proof of Value Session (POC-5)**

  - o A complete run-through of the Final POC iteration and associated booklet are held to solidify the user team's views on the outcome. The overall recommendations by team members are recorded :

    - Has the POC process has enabled them to understand and familiarize themselves with the visualization methodology?

    - Were the KPIs used sufficient to prove the operational value of this approach?

    - Can they indicate efficiency and effectiveness benefits that they anticipate enjoying as a result?

    - Are there other areas that they recommend be considered for a production implementation?

    - What if any reservations and/or concerns do they still have?

  - o A final booklet is provided following POC-5 to complete the audit trail, and to provide the basis for discussion with the project sponsor at the conclusion of the Proof of Value.

- **Week 8. Review, Conclusions and Recommendations meeting with the Project Sponsor**
  - This concluding meeting, which must include all the members of the user POC team, closes the loop on the Proof of Value process. Key expected outcomes are:
    - Confirmation of the operational benefits of the approach
    - How the process impacted the original goals and expectations
    - Recommendations for the next steps
    - Any residual concerns or recommendations by members of the User team
    - Sign-off by the Sponsor.

Appendix A.   Schedule of Prices

Actionable Intelligence Group typically charge around $80,000 for a Proof of Value, as described above.

We also provide services to support knowledge transfer, install services, support, and other development activities will be offered at a Standard Professional Services rate of $1,500 p.p. per day.

We propose Professional Services support for any additional services that are required on a Time and Materials (T&M) basis. Should the scope exceed agreed projections, we will inform the client and agree to a resolution before proceeding.

Actual Professional Services fees are billable monthly in arrears.

All actual and reasonable travel and accommodation expenses will be billed in addition to the above.