

Investment Logic Mapping: Participant Roles

Because this is a 2 hour session:

Please be on time

Please be ready to start the workshop at the scheduled time. All participants must be able to attend for the full 2 hours. If you find you are not able to attend, please advise the organiser as soon as possible.

No mobile phones

Please let the facilitator know at the beginning of the session if you need to be contactable during the workshop. Otherwise, please either turn your phone off or turn it on to silent.

No laptops, paper work, etc

You do not need to bring any documents or supporting information to the workshop.

No anecdotes or examples

Anecdotes and examples take up valuable time in a two hour workshop. The Facilitator will stop anecdotes and examples. Please do not be offended. One speaker at a time and please listen to others.

Problem Workshop Participants

The ideal number of active participants at a workshop is around 6-8 (excluding the facilitator and observers) but the nature of the investment may dictate that this is anything up to 12.

Title	Role
Investor	<p>The person who has an identified business problem (or opportunity); will be responsible for making (or advocating) a decision to invest and who will be responsible for delivering the expected benefits.</p> <p>It is critical that the Investor is present for the full 2 hours, as the key participant at the workshop. If the Investor is not able to attend for the full 2 hours, the workshop will need to be re-scheduled. The Investor should be prepared to provide the context for the investment at the workshop.</p>
Key Stakeholders	<p>Help define the business need, challenge the Investor and/or contribute supporting evidence. Key stakeholders will be senior level, strategic thinkers who understand the wider problem and its context.</p> <p>Stakeholders are not expected to bring anything to the workshop, but they are expected to have thought about the problems leading to, and expected benefits of, the proposed investment. Key stakeholders:</p> <ul style="list-style-type: none"> • Will be (or represent) those most impacted by the problem or the proposed solution; • Ensure alignment with the wider solutions/enterprise architecture around the proposed solution; • Advise on the strategic direction of the organisation in terms of policy and business strategy.
Facilitator	<p>The Facilitator has a dual role to extract the best 'investment story' from the participants and to challenge the logic behind what the participants say, particularly around the problems.</p>
Silent Observers	<p>Silent Observers such as Project Managers (PMs) or Business Analysts (BAs) may be invited to the workshops to listen to the group discussion. Observers do not sit at the table, as they are not participants. PMs and BAs are silent at the workshop as the discussion is around the business need for a change (the role of the PM/BA is to deliver the solution).</p> <p>PMs may capture any additional problems, interventions and benefits that are discussed but not considered to be the key issues to be captured in the map. These can be used as supporting information within the business case (if the proposal proceeds).</p>

Benefits Workshop Participants

This is smaller workshop with around 4-5 active participants (excluding the facilitator and observers). There should be some continuity from the previous workshops but changes to participants is usual.

Title	Role
Investor	To ensure continuity, it is desirable for the Investor to attend, but if this is not possible then a nominated deputy who has been a participant in the previous workshops may be the lead for this workshop. This should be agreed in advance between the Investor and the Facilitator. It is critical that the Investor/nominated deputy is present for the full 2 hours as the key participant at the workshop. If the Investor/nominated deputy is not able to attend for the full 2 hours, the workshop will need to be re-scheduled.
KPI Developer(s)	Individuals within the organisation who understand what is currently measured and what could potentially be measured, to provide evidence that change has resulted from the investment.
Facilitator	The Facilitator's role is to support the clarification of benefits and Key Performance Indicators that provide the best evidence that the benefits sought have been delivered.
Silent Observers	Silent Observers such as PMs or BAs may be invited to the workshops to listen to the group discussion. Observers do not sit at the table, as they are not participants.

Solution Workshop Participants

The ideal number of active participants at a workshop is around 6-8 (excluding the facilitator and observers) but the nature of the investment may dictate that this is anything up to 12. There should be continuity in the majority of the participants from the Problem Definition Workshop. The following roles are indicative; one participant may play more than one of these roles.

Title	Role
Investor	To ensure continuity, this must be the same Investor as for the Problem Workshop. The person who has an identified business problem (or opportunity); will be responsible for making (or advocating) a decision to invest and who will be responsible for delivering the expected benefits. It is critical that the Investor is present for the full 2 hours as the key participant at the workshop. If the Investor is not able to attend for the full 2 hours, the workshop will need to be re-scheduled.
Architect	Ensures alignment with the wider solutions architecture around the proposed solution.
Solution Developer	Present during Problem Workshop, key contributor to defining the solution that was proposed at that time.
Strategist	Understands the strategic direction of the organisation in terms of policy, business strategy and enterprise architecture.
Innovator	Has broad knowledge as to how innovation and new technologies are being used in the specific business area.
Implementer	Has developed solutions in the specific business area and is aware of what already exists and the feasibility of developments in this area.
Facilitator	The Facilitator's role is to extract the best 'investment story' from the participants.
Silent Observers	Silent Observers such as Project Managers or Business Analysts may be invited to the workshops to listen to the group discussion. Observers do not sit at the table, as they are not participants. PMs may capture detail of the solutions space, including what is in and out of scope, to support the development of the Business Case (if the proposal proceeds).