



iVis. 

CASE STUDY.

Capex Bid Process and Decision Support Project





CBA StrategicIT was asked to assist in providing a system and process enabling **a balanced assessment of all Capital Expenditure bids and/or business cases**. The first level of service provided was to organise a workshop for all key stakeholders involved to ensure we achieved the fullest picture of the real requirements. Part of this was to **understand the key criteria needed to assess all Bids in relevance to the key Strategic Objectives** of the organisation. Additionally it was important to determine the overall change strategy needed to implement the solution.





Once the full requirements were known, CBA StrategicIT mapped out the workflow needed to deliver the most appropriate solution, and areas for further discussion with selected stakeholder groups for key input, in order to deliver the right outcomes. These were mapped to the SAD (System Architectural Design) and workflow process flows were created for each independent process level.

The organisation's business case formats and templates were mapped to the configuration, and workflow decision junctions added where appropriate. Sample business cases were tested in a prototype of the system and areas needing adjustment were identified.

The UAT tests were developed to fully test functionality per the mapped SAD to ensure that the business requirements were met by the implemented and configured iVis solution.

In parallel the cloud environment was configured and Rational base system loaded and configured. This included setting up the static IP and addressing and user rules required for the finished system.



BUSINESS NEED

CBA StrategicIT was asked to assist in providing a system and process that delivered consistency, a single repository for all the related 'bid' and 'business case' data, whilst enabling **a balanced assessment of all capital expenditure bids and/or business cases**. This was to provide the Capital Expenditure Committee with the 'bigger picture' across the whole organisation and enable them to make decisions on the best investment for the organisation that deliver the highest value to the key objectives each year. ”



It is also of course important that these investment decisions also fit within the available budget each year and therefore the ability to prioritise base on the right assessment criteria was part of the system.

The required system was expected to be available online and preferably cloud based making it accessible from anywhere. At different times throughout the year, stakeholders from different faculties and corporate departments were required to input their bids and to perform the first level prioritisation. Later all bids across the organisation would be assessed and prioritised in context with the key strategic objectives and goals by the Capital Expenditure Steering Committee.



SOLUTION

It was determined that iVis.Capex delivered the best overall value and fit for this requirement. At the same time iVis.Capex delivered additional benefits in term of assessing priorities, understanding the bigger picture, and providing visualisation to test various 'what if' scenarios. This was needed to determine which CAPEX investments would in fact deliver the best value to the organisation.



iVis.Capex offers decision support capability and visualisation for executives to understand complex areas of analysis to provide a perspective where the governance group of the organisation could be confident that all perspectives had been considered, and that those bids finally decided upon were in fact delivering the best value plus were achieving the organisational objectives.

The solution did offer the single repository for all bid related information, offered a high degree of accountability to decision processes, and enables tight management of the Capex budget whilst keeping focus on those things that are really important to the organisation each year



CUSTOMER PROFILE

“ Large Tertiary Organisation – New Zealand ”

This organisation is one of the **largest tertiary institutions** in the NZ market and manages a **large Capex budget annually**. The various faculties and corporate departments have a **diverse range of Capex needs** and these need to be balanced across the whole organisation whilst delivering on the key annual, 5 year, and long-term strategic objectives.

The organisation provides for the tertiary education, student services, management of campuses, enrolments, compliance, marketing, learning support, research and administrative functions.





CUSTOMER TESTIMONIAL

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CBA STRATEGIC - it's **iVis.capex** solution has provided a single place for our bid information, which we can **access from anywhere**. The underlying **ibm** technology gives us the confidence that we are working with a **world class solution**. The **ivis.capex** solution has ensured we have a **consistent workflow process and robust decision making process**.it has also achieved an objective the vice chancellor had wanted - changing the discourse relating to key decisions.

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RESULTS

The implementation of the **iVis.Capex (based on IBM's Rational Focal Point)** decision support and prioritisation tool within the Capex process contributed directly to the following outcomes:



1

- Continuous improvement in the strategic outcomes achieved on money invested in capital expenditure.

2

- Greater consistency in decision-making.
- Greater transparency in the process
- A fair and equitable process

3

- Greater control over allocation of resources
- More effective use of available financial resources and cost savings due to more thorough and objective decision-making.

