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
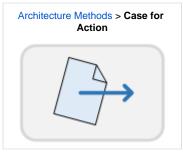
Method

Roles: Architects should facilitate and author this.

Steps:

1. Pre-condition: Analysis is nearing completion and is ready to be summarized.
2. Pre-condition: Stakeholders have gone through norming process about the as-is, to-be, and initial roadmap draft.
3. 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

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-T9i3SHiQGNBFsU75992EAmI2gHQ/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_eyw7VjXjImkHxpn3-0zxkH3eXj5Sx0zY/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