

Overview

This Job Aid defines the steps to follow for creating a creating and maintaining benefits in Sensei IQ.

There are five (5) core actions required for creating and maintaining benefits. Only the first step, identifying the benefits is mandatory, and even then, is only mandatory if your organization wishes to manage benefits.

- 1. Identifying and updating benefits
- 2. Associating benefits with goals and portfolios, programs, or projects
- 3. Capturing benefit outputs and outcomes
- 4. Defining and updating benefits metrics
- 5. Tracking benefits.

Benefit management, while only available to Strategy IQ customers, covers all three levels of Sensei IQ; Strategy IQ where the benefits are defined and managed and Portfolio and Project IQ where the benefits are delivered or realized. We will be covering all components of Benefit Management in this Job Aid.

Therefore, benefits can be defined and updated across all three levels on Sensei IQ. For simplicity, we will create and maintain benefits directly in Strategy IQ to simplify the navigation to select and open benefits, but you can perform the identical actions in Portfolio and Project IQ after selecting the appropriate portfolio, program, or project and selecting the Benefits tab.

Identifying and updating benefits

👗 🛛 Strategy Manager

⁹ Strategy IQ – New Benefit

1. DEFINE A BENEFIT

- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section.
- b. Click + New from the command bar.



- c. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the benefit in screens, reports, and dashboards
- d. Complete the remaining fields in the **Benefit pane.**
- e. Provide narratives to define the benefit's **description**, goal and dependencies in the **Objectives pane**.



tive for less than one mi.		Identify (< 1 Min)			Plan	
Details Strategic Go	al/Metrics Benefit Trackin	9				
Benefit			_	Objectives		
Name	·			Description		
Department						
Sponsor				Goal		
Start						
Finish		1	-			
Category				Dependencies		
Timeline	Short term					
Turne	Diagonal					

f. Click Save & Close to save the new benefit.

2. UPDATING A BENEFIT

- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish to update in the list.
- b. Click on the appropriate benefit from the list.



c. **Update appropriate fields** and select Save & Close.

← 🗉 💽	∰ ³ Save & Close + New	Delete	🖒 Refresh	Export to PD	F B Proces	s 🗸 🖻 Share 🕻	🕄 Email a Link
Adequate Facili Benefit	ties						Dei Ow
Benefit Process Active for 8 months	<	Identify (8 Mo)			Plan	
Details Strategic	Goal/Metrics Benefit Trac	sing					
Benefit				Object	ives		
Name	* Adequate Facilities			Desc	ription	Sick and dying c	an be treated with dignity.
Department	п						
Sponsor	A Bill Speker			Goal	1	Find facilities the	t can easily be converted into
Start	30-Dec-20					hospital or care	centers.
Finish	02-Apr-20						
Category	External			Dep	endencies	Dormant facilitie areas.	s available in the hardest hit
Timeline	Short term						
Туре	Emerged						
Tangible	Yes						

3. SETTING THE BENEFIT STAGE

- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish set or update the stage.
- b. Click on the **appropriate benefit** from the list.



Creating and maintaining benefits



- c. Select the **current stage**, identifiable by the **double red circle**.
- d. Confirm the **checklist items** have been completed.
- e. Click **Next Stage** to move the benefit to the next stage.

enefit	ies		0
enefit Process tive for 8 months	<	Identify (8 Mo)	Plan
Details Strategic G	ioal/Metrics Benefit Tr	ck Active for 8 months E2 ×	
Benefit	D	V Name * Adequate Facilities]
Name	* Adequate Eacilities	Next Stage 📏	Sick and dying can be tre

Associating benefits with goals and portfolios, programs, or projects

👗 🛛 Strategy Manager

Strategy IQ – Current Benefit – Strategic Goal

- 1. ASSOCIATE BENEFIT WITH A GOAL
- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish associate with a goal.
- b. Click on the appropriate benefit from the list.



- c. Click in the name field for the Associated Strategic Goal
- d. Search for and select the appropriate Goal.





e. If an association already exists and you want to change it, select **the X to delete** and repeat steps C and D above to select a new initiative.

Deirdre Rogusky Owner	Portfolio	Program	Annua Project	l em	ployee update meeting	^
cute	Owne	r	×	R	Deirdre Rogusky	
Outputs	🛆 Portfolio					
	☐ Program					
	Project		🖽 Annual emplo 🗙			

2. ASSOCIATE BENEFIT WITH A PORTFOLIO, PROGRAM OR PROJECT

- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish associate with an initiative, i.e. a portfolio, program or project.
- b. Click on the **appropriate benefit** from the list.



- c. Click the **down arrow** in the header.
- d. Click in the appropriate box for Portfolio, Program or Project to activate the search.
- e. Search for and **select the appropriate item** from the list.



enefit						Owner	Portfolio Program
nefit Process tive for 8 months	<	ldentify (8 Mo)		Plan	Execute	Owner	* 🤉 Deirdre Rogusky
etails Strategic Goa	al/Metrics Benefit Tracking					Portfolio	
Benefit			Objectives		Outputs	Program	
Name	* Adequate Facilities		Description	Sick and dying can be treated with dignity.		Project	Look for Project
Department	п				✓ Name ↑	Projects AA Ter	nant Renewal R300
Sponsor	A Bill Speker		Goal	Find facilities that can easily be converted into	Retrofitted	Facilities La 22-Jan	1-20 9:57 AM
Start	30-Dec-20	=		hospital or care centers.		El Annua 28-No	il employee update meeting iv-19 6:45 AM
Finish	02-Apr-20					EBI Applic 14-Ap	ation SaaS Migration r-20 2:45 PM
Category	External		Dependencies	Dormant facilities available in the hardest hit areas.	Outcomes	Assess 04 M	s the Current Ground Toxicity
					0.0000000000		

f. If an initiative already exists and you want to change it, select **the X to delete** and repeat steps C thru E above to select a new initiative.

Adequate Equipme Benefit	nt/Consumables	
Senefit Process Active for 8 months	< Identify	Plan
Details Strategic Goal	/Metrics Benefit Tracking	
Associated Strategic	Goal	_
Name	🎯 Establish a Best-in-Class Services Organization 🗙	م ا

Capturing benefit outputs and outcomes

```
Strategy Manager
```

Strategy IQ – Current Benefit

1. CAPTURE BENEFIT OUTPUTS AND OUTCOMES

- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish to define an Output or Outcome for.
- b. Click on the appropriate benefit from the list.



c. Click the **ellipses** for the appropriate area – **Benefit Output or Benefit Outcome.**

Job Aid

Creating and maintaining benefits

oupus	C II
✓ Name↑ ✓	+ New Benefit Output
Retrofitted Facilities	Add Existing Benefit Output
	🖒 Refresh
	I Run Report
	Excel Templates
	Export Benefit Outputs
Outcomes	問 See associated records
	C :
✓ Name ↑ ∨	Due Date \vee
Patient Burden Lifted from	Current Facilities 29-Jun-20

d. Create the Benefit Output or Outcome.

Name	*	
Description		
Category		
Due Date		
Owner	* Albert Connell	
Status	Active	
Progress Update		

a. Click **Save & Close** to save the new output or outcome.

Defining and updating benefits metrics

Strategy Manager

Project IQ – Current Benefit – Strategic Goals/Metrics

1. DEFINE BENEFIT METRICS

- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish to define a metricst for.
- b. Click on the appropriate benefit from the list.



c. Select the Strategic Goal/Metrics tab



d. Define the Tangible Benefits metrics in the right pane.

Adequate Facilities Benefit		-		Deirdre Rogusky Owner Port	olio Program Project
Benefit Process Active for 8 months	Identify (8 Mo)	Plan		Execute	Sustain
C Strategic Goal/Me	etrics Benefit Tracking				
Associated Strategic Goa	al		Metrics and Update In	iterval	
Name	S Decrease Admin Cost in Healthcare Industry by 1MIO		Benefit Name	* Adequate Facilities	
Ensure the reduction of	of admin cost in the healthcare industry by 1Mio		Tangible	Yes	
A Unit of Measure	Cost		Unit of Measure	Percent	
🛆 Target Date	30-Dec-22	<u> </u>	Scale	Greater than	
🗄 Scale	Less than or equal to		Benefit Goal Value	10.00	
A Value	1,000,000.00		Cumulative Measure	No	
			Update Interval	Monthly	
			Benefit Impact		
			Start	30-Dec-20	
			Finish	02-Apr-20	a
			Direct Benefit	Yes	

OR

e. Define the Intangible Benefits in the right pane

Adequate Facilities Benefit Benefit Process Active for 8 months	(dentify (8 Mo)	Plan		Deirdre Rogusky Owner F Execute	Portfolio Program	Annual employee update meeting Project	`
Details Strategic Goal/Me	trics Benefit Tracking						
Associated Strategic Goa	d		Metrics and Update In	terval			
Name	Decrease Admin Cost in Healthcare Industry by 1MIO		Benefit Name	* Adequate Facilities			
Ensure the reduction of	f admin cost in the healthcare industry by 1Mio	E	Tangible	No			
A Unit of Measure	Cost		Start	30-Dec-20			
🛱 Target Date	30-Dec-22	00	Finish	02-Apr-20		±	
🛆 Scale	Less than or equal to						
🖰 Value	1,000,000.00						

Tracking benefits

Project Manager

Strategy IQ – Current Benefit – Benefit Tracking

1. CREATE BENEFITS TRACKING RECORD

- a. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish to track benefits for.
- b. Click on the **appropriate benefit** from the list.



- c. Select the Benefits Tracking tab
- d. Click + New Benefits Tracking to create a new Benefits tracking record



Creating and maintaining benefits

Adequate Fa Benefit	cilities				
Deirdre Rogusky Owner	Portfolio	 Program	Annual employee upda Project	ate meeting 🗸 🗸	
Benefit Process Active for 8 months			ldentify (8 Mo)	Plan	Execute
Details Strate	gic Goal/	C !	Benefit Tracking		
					ew Benefit Tracking

e. Create **Benefits Tracking records** based on how each benefit has been defined, i.e. unit of measure, update interval and start/finish dates.



2. UPDATE BENEFITS TRACKING RECORD

- a. Based on **the update frequency defined by the Update Interval**, the Benefits Tracking records should be updated to reflect **Actuals benefits realized** and to update any **remaining forecasts** as required. Ensure you are in **Strategy IQ**, click **Benefits** in the **Strategy** section. Select and find the benefit you wish update benefits tracking.
- b. Click on the appropriate benefit from the list.



- c. Select the Benefits Tracking tab
- d. Click the appropriate Benefits Tracking record.



Creating and maintaining benefits



- e. Update the Benefits Tracking records based Actuals realized or updated forecasts.
- f. Provide **comments** as required to define values entered.

	BTE-1069 Benefit Tracking								
	Details								
	Date	*	28-May-20						
	Planned Value		5,000.00						
	Forecast Value		6,000.00						
	Actual Value		5,750.00						
F	Status Comment		We have hired our May	SME.					
	-								