

#### Overview

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

There are four (4) 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.

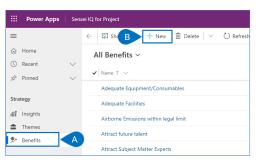
- 1. Identifying and updating benefits
- 2. Capturing benefit outputs and outcomes
- 3. Defining and updating benefits metrics
- 4. Tracking benefits.

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 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.

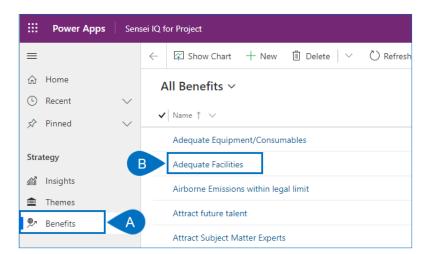


Ne	w Benefit					
	fit Process of for less than one mi	< Identify (<	1 Min)		Plan	
	ails Strategic Goa	I/Metrics Benefit Tracking				
Be	enefit			Objectives		
c	Name	*		Description		
Ī	Department					
	Sponsor			Goal		
	Start		E			
	Finish					
D	Category			Dependencies		
	Timeline	Short term				
	Туре	Planned				
	Tangible	No				

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.

fit	es	-		
for 8 months	<	Identify (8 Mo)		Plan
ails Strategic G	oal/Metrics Benefit Tracl	cing		
enefit			Objectives	
Name	* Adequate Facilities		Description	Sick and dying can be treated with dignity.
Department	π			
Sponsor	A Bill Speker		Goal	Find facilities that can easily be converted int
Start	30-Dec-20			hospital or care centers.
Finish	02-Apr-20			
Category	External		Dependencies	Dormant facilities available in the hardest hit areas.
Timeline	Short term			
	Emerged			

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.

	Power Apps	Sen	sei IQ for Project
≡			$\leftarrow$ 🖾 Show Chart + New 🛍 Delete   $\vee$ 🖒 Refresh
ŵ	Home		All Benefits ~
	Recent	$\sim$	
\$	Pinned	$\sim$	✓ Name ↑ ∨
			Adequate Equipment/Consumables
Stra	tegy		Adequate Facilities
สมัติ	Insights		Airborne Emissions within legal limit
Ê	Themes		
,∰∽	Benefits	Α	Attract future talent
-			Attract Subject Matter Experts

- 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.

	Power Apps	Sens	ei IQ fo	r Proje	ct										
=			~		🗟 Save	🖨 Sav	e & Close	+ New	🗓 Delete	🖔 Refresh	Export to PDF	🖯 Pro	cess 🗸	🖻 Shan	3
ଜ	Home		Ad	d mo	ore polic	e call	boxes i	n each st	ation						
٩	Recent	$\sim$	Idea		•							1			
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Intal	ke			Desc	ription		Wireless riders fee		ed call buttons	can be added	✓ Investment Cate	gory	Run		
สนั	Insights									E	1	lext Stage	>		
1	Proposals									l,					

# Capturing benefit outputs and outcomes

#### Strategy Manager

Strategy IQ – Current Benefit

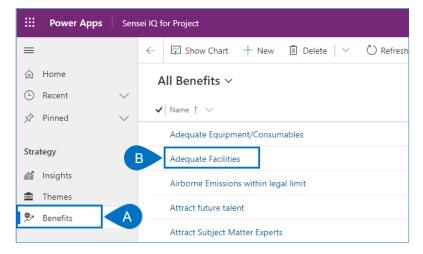
#### 1. CAPTURE BENEFIT OUTPUTS AND OUTCOMES

- 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.



Job Aid

## Creating and maintaining benefits



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

Outputs	
	C
✓ Name ↑ ✓ D	+ New Benefit Output
Fully trained staff	Add Existing Benefit Output
	🖔 Refresh
	Run Report >
	Excel Templates
	Export Benefit Outputs
Outcomes	思 See associated records
	C
✔ Name ↑ ∨	Due Date $\vee$
Ventilators/Masks Distributed	02-Apr-20

d. Create the Benefit Output or Outcome.

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

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

## 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.

	Power Apps	Sen	sei IQ for Project
≡			$\leftarrow$ 🖾 Show Chart + New 🛍 Delete   $\vee$ 🖒 Refresh
ŵ	Home		All Benefits ∨
	Recent	$\sim$	
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			Adequate Equipment/Consumables
Stra	tegy		Adequate Facilities
<i>.</i> 111	Insights		Airborne Emissions within legal limit
≘	Themes		- Attract future talent
,∰	Benefits	A	Attract future talent
			Attract Subject Matter Experts

- c. Select the **Strategic Goal/Metrics** tab
- d. Define the **Tangible Benefits** metrics in the right pane.

equate Facilities	0			Deirdre Rogusky Owner	
<b>fit Process</b> e for 10 months	< Identify (10 Mo)	Plan		Execute	
Strategic Goal/M	Metrics Benefit Tracking				
ssociated Strategic G	oal		Metrics and Update In	terval	٦
Name	© Decrease Admin Cost in Healthcare Industry by 1MIO		Benefit Name	* Adequate Facilities	
☐ Ensure the reduction	of admin cost in the healthcare industry by 1Mio		Tangible	Yes	
🔒 Unit of Measure	Cost		Unit of Measure	Percent	
🛆 Target Date	30-Dec-22	<u></u>	Scale	Greater than	1
🔒 Scale	Less than or equal to		Benefit Goal Value	10.00	
A Value	1,000,000.00	D	Cumulative Measure	No	1
			Update Interval	Monthly	
			Benefit Impact		
			Start	30-Dec-20	
			Finish	02-Apr-20	
			Direct Benefit	Yes	

#### OR

e. Define the Intangible Benefits in the right pane

equate Facilities					Program Project
fit Process : for 8 months	< Identify (8 Mo)	Plan		Execute	Sustain
ails Strategic Goal/N	Metrics Benefit Tracking				
ssociated Strategic G	oal		Metrics and Update	Interval	
Name	Observation Cost in Healthcare Industry by 1MIO		Benefit Name	* Adequate Facilities	
	n of admin cost in the healthcare industry by 1Mio	E	Tangible	No	
🔒 Unit of Measure	Cost		Start	30-Dec-20	Ē
A Target Date	30-Dec-22		Finish	02-Apr-20	Ē
🖴 Scale	Less than or equal to				
🛱 Value	1.000.000.00				



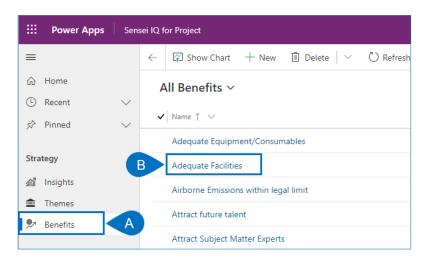
# Tracking benefits

着 🛛 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

Adequate Facilities			Health Services Program NSP Core Program Project	System Readin
Senefit Process Active for 10 months	ldentify (10 Mo)	Plan	Execute	Sustain
Details Strategic Goal/NC	Benefit Tracking			
			D + New Benefit Tracking	🖱 Refresh
$\checkmark$ Date $\uparrow$ $\checkmark$	Planned Value $\checkmark$	Forecast Value $\lor$	Actual Value $\vee$	
01-Jun-20		30,000.00	125,000.00	

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

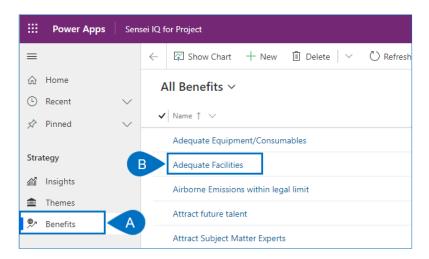


## Creating and maintaining benefits

	Quick Create: Benefit Tracking	×
	Date *	
E	Planned Value	
	Forecast Value	
	Actual Value	
	Status Comment	

#### 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.

Details	Strategic Goal/Metrics	Benefit Tracking
~	Date ↑ ∨	
	01-Mar-20	
D	01-Apr-20	
	01-May-20	
	01-May-20	
	08-Jul-20	

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



## Creating and maintaining benefits

	BTE-1005 enefit Tracking		
Details			
	Date	* 01-Apr-20	
E	Planned Value	100,000.00	
	Forecast Value	200,000.00	
	Actual Value	30,000.00	
F	Status Comment	Below Target	