



Accredited Investment Logic Standard Facilitator

Organisation Overview

[TOTAL METRICS](#), established in 1994, is an Australian owned company, which has earned a strong international reputation for delivering quality metrics based services worldwide. We work across a diverse range of organizations, both in the private and public sector in Australia, Asia Pacific, USA, UK, China, Europe, India and Japan.

TOTAL METRICS is a preferred supplier for Government and has been a Victorian Government EServices Panel Member since 2003 and **as of July 09 was appointed in the role of Eservices Panel provider for Investment Management Standard services**

TOTAL METRICS has been Queensland Government GITC Accredited supplier since 2006. Our work with Victorian Government departments includes acting in the role of independent Scope Managers, on major government IT projects. We provide consultancy in project estimation, supplier evaluation, project scope variations, investment assessment and software project pricing. Our extensive experience in the delivery of software metrics services to the ICT industry, differentiates our service offering. The key deliverable from this Investment Logic Standard is the quantification and monitoring of benefits. The development and implementation of effective and practical performance measures lies at the core of our work on outsourcing contracts and benchmarking. TOTAL METRICS has over 15 years experience facilitating client workshops that define key performance measures for their business processes. This experience is essential in developing the Key Performance Indicators that underpin the **Investment Logic Maps** and the **Benefits Management Plan**.

The practices involved in the Victorian Government's Investment Management Standard are a natural extension of our current early project life cycle services; assisting clients in project scoping, developing realistic project budgets and schedules. These are the core elements of **Investment Concept Briefs**. Our client list includes the following Victorian & Federal Government Departments & Agencies:

- Australian Customs Service
- Australia Post
- Australian Valuers Office
- Australian Taxation Office
- Essential Services Commission
- Office of the CIO
- Multi Media Victoria
- Telstra
- Department of Human Services
- Department for Vic Communities
- Department of Premier and Cabinet
- Department of Education & Training
- Dept of Primary Industries - Fisheries
- D.I.I.R.D.
- Department of Justice
- State Revenue Office
- Vic Police
- Vic Roads
- VCAA
- South East Water Ltd
- Department of Defence
- Department of Finance
- DEWR
- Dept of Immigration & Ethnic Affairs
- Health Insurance Commission
- Department of Veteran's Affairs

Facilitator Profile – Pam Morris

[Pam Morris](#), is the Managing Director of Total Metrics. She has over 20 years experience in software development and since 1989 has specialised in the area of software measurement and process improvement. She has a Bachelor of Science Degree, a Graduate Diploma of Computing and a Diploma of Education from La Trobe and Monash Universities Australia. Pam is an accredited Investment Logic Map Facilitator.

Pam is a Vice President of the Quantitative Enterprise Software Performance (QESP formerly known as ASMA) where she currently holds a position on their Executive and the Benchmarking Database Special Interest groups. In 2007 she was elected as Vice President of the International Software Benchmarking Standards Group (ISBSG) and is on the ISO/IEC Study group for the NWI Benchmarking Standard. She represents Standards Australia as the international project editor of the ISO standard 14143-1 and 2 for Functional Size Measurement. She was the international convenor of ISO/IEC/WG12 group developing FSM standards from 1997 to 2004. She plays an active role internationally in the development of measurement standards and was a member of the International Function Point User Group (IFPUG) Counting Practices Committee in the USA from 1993 to 2000 and is a reviewer of the IFPUG documents. She is a member of the COSMIC-FFP Core Group who is responsible for in the development of the COSMIC-FFP FSM method. She has been an IFPUG Certified Function Point Specialist (CFPS) since 1994, and a COSMIC Certified Practitioner and a Certified Software Measurement Specialist (CSMS Level 3) since 2006. In 2006 Pam was awarded the Australian ITP Lifetime Achievement Award for her services to the IT Industry. In 2007 Pam was invited to be an international expert partner of the Chinese Software Benchmarking Standards Group.

Pam has combined her consulting experience in software metrics with her previous experience in the educational field to develop and present a variety of Software Metrics workshops and training courses. She has provided consulting services and presented training courses to over 200 corporate and government organizations in the USA, Japan, China, Australia, India and New Zealand since 1991.

Practices

In facilitating the development of [Investment Logic Maps, Investment Concept Briefs and Benefits Management Plans](#), Total Metrics fully complies with the current guidelines and practices from the Investment Management Standard of the Department of Treasury and Finance (Victoria).

Investment Logic Maps

The **Investment Logic Map (ILM)** is developed in a two-hour **Problem Definition Workshop** in which the key participant is *the Investor* – the executive that has the business need, will be making the decision to invest and who will ultimately be responsible for delivering the expected benefits. The Investment Logic Map is an executive summary of the case to invest.

A draft ILM depicting the outcomes of the workshop will be delivered to the Investor within 24 hours of the workshop. This will contain observations of its quality and any suggestions for improvement. The Investor will review the draft and advise of any changes within 48 hours of the time of the workshop. The final ILM will then be provided back to the Investor within 24 hours.

Investment Concept Briefs

An **Investment Concept Brief (ICB)** is created in a two-hour **Solution Definition Workshop** that reviews and reshapes the solution depicted in the Investment Logic Map at the previous workshop. The likely timelines, cost, risk and dependencies associated with the solution are then extracted. The workshop also validates that the benefits that are sought are realistic.

A draft ICB based depicting the outcomes of the workshop will be delivered to the Investor within 24 hours of the workshop. The Investor will review the draft and advise of any changes within 48 hours of the time of the workshop. The final ICB will then be provided back to the Investor within 24 hours.

Benefit Management Plan

The 2 hour **Benefits Definition Workshop** delivers a **Benefit Management Plan (BMP)** which is a short document that defines the investment benefits, the pre-requisites for the delivery of each expected benefit, how the delivery of each benefit will be measured, and who will be responsible for measuring and realising each benefit.

A draft BMP based depicting the outcomes of the workshop will be delivered to the Investor within 24 hours of the workshop. The Investor will review the draft and advise of any changes within 48 hours of the time of the workshop. The final BMP will then be provided back to the Investor within 24 hours.

Facility Requirements (for all products)

A suitable room with an electronic whiteboard that will comfortably accommodate participants.

Cost of Products

Product	Cost (includes GST)	Comments/Conditions
<ul style="list-style-type: none"> Investment Logic Map 	<ul style="list-style-type: none"> \$ 2,618 (Eservices Panel price)	<ul style="list-style-type: none"> Includes preparation and conduct of two hour Problem Definition workshop, and preparation of draft and final Investment Logic Map.
<ul style="list-style-type: none"> Investment Concept Brief 	<ul style="list-style-type: none"> \$ 2,618 (Eservices Panel price)	<ul style="list-style-type: none"> Includes preparation and conduct of two hour Solution Definition workshop, and preparation of draft of draft and final Investment Concept Brief. Additional cost may be incurred if client also requires software project cost estimation services.
<ul style="list-style-type: none"> Benefit Management Plan 	<ul style="list-style-type: none"> \$ 2,618 (Eservices Panel price)	<ul style="list-style-type: none"> Includes preparation and conduct of two hour Benefits Definition workshop, and preparation of draft and final Benefit Management Plan. Additional cost may be incurred if client also requires consultancy for metrics and KPI establishment
<ul style="list-style-type: none"> Investment Management Package 	<ul style="list-style-type: none"> Negotiable depending on scope 	<ul style="list-style-type: none"> Discounted rate available if all three workshops are commissioned as a package, with all three workshops scheduled within a three month (90 day) period. Includes development of draft and final versions of: <ul style="list-style-type: none"> o Investment Logic Map o Investment Concept Brief o Benefit Management Plan

For additional products and services provided by Total Metrics refer to www.totalmetrics.com

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