

## Accredited Investment Management Facilitator Profile

### Introduction

Ecosphere provides the complete range of investment management services consistent with the Victorian Government's Investment Management Standard. We conduct formal facilitated workshops and structured reviews early in the investment lifecycle to ensure the proposal is conceptually sound, reduce the costs associated with business case development and increase the likelihood that proposals will be both funded and likely to deliver value in the future.

### Facilitator Profile

Whilst with the Department of Treasury and Finance (DTF), Jeremy Smart was involved in the early evolution of the Standard. He has extensive experience in this field, having facilitated over 100 workshops since the inception of the Standard. His clients include:

- All Victorian government departments and key agencies.
- Metropolitan and regional local councils.
- Government agencies across Australia and New Zealand.

Since 2007, he has conducted over 250 formal ILM reviews for the Victorian Government. In association with Rae Fankhauser, Jeremy provides formal DTF sponsored training for those wishing to learn how to facilitate these workshops.

### Our Approach

Each workshop includes the following:

<i>Before the workshop</i>	Assistance in the selection of participants
	Provision of advice to selected participants
<i>During the workshop</i>	Clear articulation of the process to be followed
	Development of the relevant map, plan or brief
<i>After the workshop</i>	Provision of a draft version within 24 hrs with comments
	Provision of a final version after a 48 hr review period

## Problem Definition Workshops

This workshop aims to define both the problem to be resolved and the benefits that are likely to be realised to the degree they are currently known. This workshop is a powerful communications forum where the investor and stakeholders can discuss and understand the need for the investment and its implications. Whilst the primary focus of this workshop is defining the problem, it also provides an insight into the potential solution and aims to quantify the intended benefits.

The output from this workshop is the **Investment Logic Map**

## Solution Definition Workshops

Whereas the first workshop focuses on the problem and benefits sought, this workshop identifies and scopes the likely solution. The solution itself is defined as the combination of changes to the way people work and interact and any physical assets required in order to support those changes taking place. The emphasis of the workshop is on determining whether the proposed solution is innovative, feasible and strategically aligned.

The output from this workshop is the **Investment Concept Brief**

## Benefit Definition Workshops

This workshop will test the benefits identified in the previous workshop. The aim of this workshop is to determine the optimal set of KPI's used to monitor the achievement of those benefits and assign accountabilities for both their achievement and the provision of data during the reporting regime.

The output from this workshop is the **Benefit Management Plan**

Service	Cost (Including GST)
Problem Definition Workshop	\$1540
Benefit Definition Workshop	\$1540
Solution Definition Workshop	\$1540

## Jeremy Smart

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