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Presenting Business Cases Containing Complex, Technical Information to a Varied Audience

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Introduction

The US Census Bureau has a SAS deployment of approximately 2600 active users, which the Software Application Branch (SADB) with in the Applications Services Division supports. Identification of appropriate SAS support resources is a difficult task considering the diverse use of SAS amongst the user community. We had to gather information, enlist help from many sources and get everyone involved in the effort on the same level of understanding with respect to the challenges faced, and agreement on a proposal to address the issues. This poster describes the process we used to evolve method SADB used to justify the evolution of the Census SAS Support paradigm. It focuses on the techniques we used to gain user and executive support for our proposal while giving some insight on why we used them.

A Business Case -

Captures the reasoning for initiating a project or task. People often present them in a well-structured, written document, but the size and format varies depending on audience, cost and complexity of the issue. The logic of the business case is that, whenever a business case requests resources such as money or resources it should be in support of a specific business need.

The Steps to Build a Business Case

1. Identify the Problem

Use a wide audience to define the problem to promote -

- A feeling of ownership
- Team building
- Problem awareness

2. Describe or Define the Problem

Describe the problem simply, but completely

- Use a persuasive writing style
- Avoid technical jargon
- Engage the people who helped identify the problem

3. Identify and Evaluate Potential Improvement Options

Continue to engage the people who helped identify the problem

- Present the information in a narrative format
- Keep the narrative short and repeatable
- Show what's in it for them
- Engage members of your audience to help you create/edit the document and therefore get their buy-in whenever possible

4. Consider the Preferred Option's Risks and Sensitivities.

Remember to engage your audience by basing the business case around how this information pertains, or more importantly helps them.

- Define the scope of the information you have to disseminate
- Define your audience
- Determine your audience's level of understanding and their interest level
- Develop a common outline or "story" with repeatable talking point
- Develop different levels of the "stories" based the common outline. Add more or less detail depending on your audience's needs and understanding.

6. Get Buy-In

By engaging the members of your audience to help you create/edit the business case, you have helped educate the on the importance of your business case.

- Present the business case informally to other people
- Make the formal presentation

Examples

Problem Definitions

2.1.1. The Census Bureau does not release new versions of SAS in a timely manner. This delays the analysts' access to the latest technologies.

EXAMPLE: The SAS Institute released SAS 9.2.2.3 in May 2010 and the Census Bureau completed 99.8 % of the upgrades by May 5, 2012. SAS 9.3 came out in July 2011 and we have yet to install it in the Census Bureau environment.

2.1.2. Although the desktop SAS product is designed to enable self-service installation, customers encounter problems during installation that require LAN Technology Support Office (LTSO) support personnel to be on-site during installation to limit calls to the Help Desk. Users complain that installation takes too long and is fraught with problems. PC installations take between 90 to 120 minutes to complete.

EXAMPLE: *Out of the first 2546 installations of SAS 9.2.2.3 on business area desktops 416 installations had errors attributed to non-standard desktop configurations.*

Problem Solutions

2.1. Resolve SAS Desktop Installation Problems

We are working with the VDI team to use SAS best practices when incorporating SAS into VDI. The IT PMO is already tracking this project. We expect future desktop releases to be faster and easier once SAS is in VDI as long as everybody continues to follow SAS best practices.

Needs: Continued cooperation and communication between ASD and the VDI Team. Funding for fully certified Sr. Citrix Engineer who is well versed in implementing SAS in VDI.

Cost:

Status: The VDI team released SAS 9.2.2.3 in VDI on August 7, 2012. *Waiting on additional funding for further VDI/SAS deployments.*

Reference

Hunbel Meer,"Four Different Types of Writing Styles: Expository, Descriptive, Persuasive and Narrative"
<http://hunbel-meer.hubpages.com/hub/Four-Types-of-Writing>

Acknowledgement

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ADDITIONAL RESULTS

Our Three Main Talking Points: Three Main Points to Address

- **SAS Support** – Two Feds and Two Contractors currently are responsible for SAS Enterprise Support
- **SAS Infrastructure** – Insufficient infrastructure to support, test, debug SAS
- **SAS Installations** – PC installs take 90 – 120 minutes. Server Installs are not consistently configured. No common security controls.

One of the Talking Points Repeated: Solutions for SAS Support

- Establish a SAS Center of Excellence (COE)
- Appoint a SAS ombudsman or user advocate to IT from each directorate

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