

Accredited Investment Management Facilitator Profile

Organisation Overview

Ecosphere provides a 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; increase the likelihood that a proposal will gain funding; and improve the likelihood that investments will deliver their intended benefits.

Carbon Neutral

Ecosphere provides sustainable services by accounting for the environmental costs involved in constructing, using and disposing of computer hardware and software. To achieve this, Ecosphere pays climatefriendly.com.au to offset 1 tonne of greenhouse gases each time investment management services are provided.

Facilitator Profile

Whilst with the Department of Treasury and Finance, Jeremy Smart was influential in the development and evolution of the Standard. He has extensive experience in both facilitating workshops and reviewing investment logic maps and benefit management plans submitted by the departments and agencies.

Practices

In facilitating the development of Investment Logic Maps, Investment Concept Briefs and Benefit Management Plans, Ecosphere fully complies with the current guideline and practices from the Investment Management Standard of the Department of Treasury and Finance (Victoria).

Investment Logic Maps

The ILM is developed in a two-hour 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. A draft ILM 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 ILM will then be provided back to the Investor within 24 hours.

Investment Concept Briefs

An Investment Concept Brief (ICB) is created in a second two-hour 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.

Benefit Management Plans

A Benefit Management Plan (BMP) defines each benefit identified in the original ILM and establishes the key performance indicators that will be measured over the investment lifecycle. This is a critical addition to any business case.

Facility requirements (for Services 1, 2 and 3)

A suitable room with an electronic whiteboard will be required.

Cost of products

| <i>Service</i> | <i>Product</i> | <i>Cost (incl. GST)</i> |
|----------------|------------------------------------|-------------------------|
| 1 | Investment Logic Map Workshop | \$990 |
| 2 | Investment Concept Brief Workshop | \$990 |
| 3 | Benefit Management Plan Workshop | \$990 |
| 4 | Three Workshops (ILM, ICB and BMP) | \$2530 |

Ecosphere also provides a formal review service for clients who have already developed an investment logic map or benefit management plan. The cost for this service is \$330.

All documentation will be delivered within 24 hours of a review or workshop.

Contact

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