Question Guide and Documentation Cards for VP and SE

Training materials 3.1 | Calculation model 3.0 | US edition: October 7, 2026

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Worksheets for training and practical use · Editorial revision 3.1 · Calculation model 3.0 · EnableAI

How to use the cards

Create a copy for each project and each independent benefit or activity. Record the answer in natural units before converting it to points. A blank field means unresolved; zero requires an explanation. Keep dated approvals and a change log. These templates are EnableAI's own working tools. They support principles of explicit criteria, documentation, and follow-up from MCDA and GAO; they are not templates supplied by those sources.

Card A: Project and decision

Field	Questions and records
Identity	Project ID, title, decision ID, date, model profile, and current phase
Problem	Which workflow is inadequate, for whom, and with what consequence?
Alternative	What happens without the project? What simpler change is possible?
Scope	What is included, what is excluded, and what dependencies exist?
Measurement period	Adoption date, benefits in the first 90 days, and any lifecycle analysis
Accountability	Accountable business owner, project manager, estimating leads, and decision-maker
Requirements	Mandatory quality, safety, and other acceptance criteria
Decision	Which next step needs funding, and what uncertainty should it resolve?

Card B: From questions to VP

Field	What needs documenting?
Benefit ID	For example, V-P1-D1-01; link to the project and criterion
Claim	The original expected outcome in the accountable owner's own words
Specific indicator	Unit, direction, definition, and any segment
Baseline	Level, period, number of observations, source, and selection method
No-project alternative	Expected trend and concurrent changes
Input	Volume, adoption, benefit per unit, and any realizable share

Field	What needs documenting?
Input status	Observed, calculated, based on a comparable example, or an expert assumption
Raw improvement	Formula and result in the natural unit; low/central/high
VP	Reference, weight, formula, and result; direct/indirect subtotal
Overlap	Is the same time, customer, incident, or opportunity counted in another benefit?
Verification	Measurement method, timing, measurement owner, and access to evidence
Decision rule	Minimum, relative and absolute tolerance, and mandatory requirements

Completed example: capacity put to use

Benefit V-TR1-D1-01. Problem: lengthy active handling of relevant standard cases. Expected volume is 8,000 cases over 90 days; usage is 75%; gross savings are four minutes with one minute of extra review; 60% of net time is allocated to planned customer work. The raw improvement is 8,000 × 0.75 × (4 - 1) / 60 × 0.60 = 180 hours. With a reference of 600 and weight of 15, D1 is **4.5 VP**.

Document volume with a dated case extract, net time with a comparable trial, and usage share with a measured user cohort. The realizable share requires the accountable owner's capacity plan. Until evidence is available, record the figures as assumptions. The same capacity is not also a cash saving. This example uses training data.

Card C: From activity to K

Field	What needs documenting?
Activity ID	Project, phase, and independent deliverable
Scope	What will be completed, and what is already included elsewhere?
Quantity	Number of cases, meetings, participants, groups, integrations, or other units
Time or price per unit	Data source, validity, and low/central/high estimate
Internal hours	Quantity × time; all participants' time, including preparation and follow-up
External purchases	Amount, currency, conversion, price index, quote, and payment timing
Phase allocation	Next phase and remaining later phases
Base estimate	Hours × the internal reference hourly rate + external purchases in reference USD
Owner and acceptance	Who estimates it, and what demonstrates that the work is complete?

Completed example: training

30 employees × 2 hours = 60 hours. An internal coordinator spends 10 hours. An external instructor charges approximately $1,800. Training therefore requires 70 internal hours plus approximately $1,800 externally; K is approximately $8,150 in reference resources and **2.40 SE** at a price index of 1.00. The external instructor’s hours are not internal hours. Add a separate technical deliverable of 75 hours, and the full example requires 145 internal hours, approximately $14,900 in reference resources, and **4.40 SE**.

Card D: Named risks and residual uncertainty

Field	Question
Risk ID	Which cause could trigger which event, and within what period?
Probability	What history or expert assessment supports the figure?
Consequence	How many additional hours and purchases would the event require?
Overlap with the base estimate	What is already in K, including approved preventive work?
Connection to VP	Does a benefit also decrease, and where is that recorded?
R	Probability × additional resource use at reference rates
Owner and trigger	Who monitors the risk, and what triggers action?
Scope of U	Which other activities still have uncovered uncertainty?
Basis for U	Exposed base estimate, history or assumption, allowance, and overlap check
Investigation	Which test could reduce or reclassify the uncertainty?

Card E: Phase follow-up and decision

Field	Record
Approved baseline	Date, scope, profile, VP, K/R/U, remaining SE, and phase estimate
Actual benefit	Same indicator, same unit, source, and observation period
Actual effort	Hours and purchases on a common price basis
Scope change	Approved change ID and separate effort; forgotten work is an estimation error
Variances	Raw and adjusted size errors, plus value error measured against the improvement
Interpretation	Is the estimate accurate? Is the benefit sufficient? Are requirements met?
New forecast	Updated VP and remaining SE; retain the old figures
Decision	Stop, adjust, investigate, or continue; owner, date, and conditions

Transferring data to the existing spreadsheet

Project Cards receives Card A. Value receives raw improvements from Card B; Calibration contains references and weights. Resources and Risks receive totals from Cards C-D. Size combines K/R/U. Phase Follow-up and Measurement Points receive Card E. Realized and Actual Value show the final outcome.

The spreadsheet has 12 project slots, three decisions per project, 16 resource rows, and three risk rows per decision. Cards may contain more detail than the sheet; aggregate it with a documented mapping. Additional risks need a clearly linked sublog or a controlled extension of the sheet. No risk should disappear just because only three rows are visible.

The spreadsheet does not replace the evidence archive. Save scorecards and sources with stable IDs. Cards can live in a document, an approved collaboration tool, or a database. What matters is that a colleague can find the inputs, reproduce the figure, and see changes over time.

Use sources and cases critically

Morgan Stanley illustrates ongoing evaluation; it does not determine another company's benefits. Use the five project examples to practice the cards, and read VP, SE and the follow-up guide, before teaching interpretation.

Currency: rounded USD equivalents at the ECB reference rates for October 6, 2026. Calculations use unrounded values; displayed amounts may not reproduce exact totals. The original model calibration is retained. Reference rates are resource weights, not US market rates or billing prices.