Two Half-Day Workshops: VP, SE, and Management Decisions

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Purpose, format, and scope

The program consists of **two four-hour workshops, each including a 15-minute break**. Half-day 1 covers value points (VP). Half-day 2 covers size units (SE), overall prioritization, and follow-up. They replace the model's previous three-hour introductory workshop. Existing Copilot courses and their follow-up workshops are separate offers; their duration does not automatically change.

The audience includes managers, accountable business owners, project managers, product owners, and representatives from IT, finance, HR, and change management. A group of 6-12 allows cross-functional teamwork. No technical AI background is required. Examples cover AI, IT, and ordinary business workflow changes.

Allow 5-10 business days between sessions so participants can test their assumptions. Online delivery is available; on-site delivery is by arrangement. The program provides a shared method and concrete drafts. A complete investment case still requires the business's own data. The detailed articles serve as preparation and reference material.

Methodological foundations and EnableAI's contribution

MCDA provides the basis for explicit preferences and sensitivity analysis; GAO supports systematic estimation and follow-up. EnableAI selected the VP/SE units, starting profile, question guides, exercises, and teaching sequence. The two half-days are an EnableAI offering, not an external certification. MCDA · GAO.

Use public cases for critical reflection: Morgan Stanley for evaluating knowledge and quality; METR for the difference between perceived and measured results. EnableAI's five worked project examples are training material, not documented customer outcomes.

Preparation before half-day 1

Send the one-page overview, the VP article and a blank project and benefit scorecard. Ask each group to describe a real workflow and bring a relevant data example covering volume, time, errors, expenses, or customer events. Anonymize sensitive personal data in training materials.

The sponsor identifies accountable business owners and clarifies whether the group may propose a local calibration or must use an approved profile. The instructor prepares a spreadsheet with blank project slots and the five recurring examples. Do not present weights as “objectively correct.”

Half-day 1: Estimate and document business value in VP

Time from start	Minutes	Activity	Specific deliverable
00:00-00:15	15	Purpose, decision, and shared expectations	One decision and one problem per group
00:15-00:40	25	Benefit, baseline, and no-project alternative	Defined process and comparison baseline

Time from start	Minutes	Activity	Specific deliverable
00:40-01:15	35	Interview exercise: from claim to indicator	First completed benefit scorecard
01:15-01:45	30	From raw improvement to VP	Calculation with units and source evidence
01:45-02:00	15	Break	
02:00-02:35	35	Indirect value and overlap	Opportunity card and overlap check
02:35-03:05	30	Calibration and uncertain assumptions	Draft shared profile and three scenarios
03:05-03:40	35	Your own case and peer verification	Reproducible VP estimate
03:40-04:00	20	Teaching assessment and between-session assignment	Owner, data needs, deadline, and review

Facilitator instructions

Start by asking participants to describe the problem without product names. Use a sentence such as “we spend too long finding a correct answer.” Ask who “we” refers to, what “too long” means, and how correctness is determined. Proceed only when the group can describe a clearly bounded task.

For the interview exercise, three people take the roles of accountable business owner, interviewer, and observer. The interviewer must not suggest scores during the first ten minutes. The observer notes missing units, owners, and data sources. Rotate roles for the next benefit.

The calculation exercise uses 8,000 tasks, 75% adoption, four minutes of gross time savings, one minute of review, and 60% usable capacity. The result is 180 hours and 4.5 VP. Ask each group to explain why the SE hourly reference rate of approximately $90 does not justify also recording a cash saving in D2.

The indirect-value exercise presents five brainstormed ideas without demonstrated feasibility. The answer is zero realized qualified opportunities under the chosen definition. The group then designs a test that could qualify one opportunity. Discuss learning, brand, talent, and job satisfaction without treating indicators as proof of future revenue.

During calibration, compare improvements from zero to the reference points. Participants explain their priorities before assigning weights. Ask a group with different reasonable preferences to recalculate the case. The difference should prompt management discussion, not be hidden as an error.

Criteria for a useful result after half-day 1

Each group submits at least one complete benefit scorecard and an overview of other relevant criteria. The card includes a baseline, no-project alternative, unit, formula, low/central/high forecast, accountable owner, sources, minimum, tolerance, and measurement date. Another group must be able to reproduce the calculation. Unresolved inputs may remain open if there is a concrete plan to investigate them.

The participant explains a benefit in five minutes. The observer assesses four points: clear outcome, verifiable input, correct calculation, and honest limitations. Each is rated “clear” or “needs more work.” All four must be clear before the participant independently facilitates this part of the process in the business.

Between-session assignment: from assumption to stronger evidence

Groups investigate their two most important assumptions. This might involve a time-data extract, representative sample, vendor quote, or clarification of how released capacity can actually be used. The accountable owner documents changed inputs, and the project manager describes the necessary business and IT activities.

Allow approximately 60-90 minutes of preparation per participant, in addition to data collection. Agree on larger measurement tasks separately. The instructor reviews the cards before half-day 2 and flags gaps. Participants must preserve the history when revising the first approved forecast.

Half-day 2: Estimate SE, prioritize, and follow up

Time from start	Minutes	Activity	Specific deliverable
00:00-00:20	20	What changed after the between-session assignment?	Updated VP forecast with explanations of changes
00:20-00:50	30	The full effort across business and IT	Activity breakdown with owners
00:50-01:25	35	From hours, purchases, and price year to K and SE	Reproducible base estimate
01:25-01:45	20	Named risks and residual uncertainty	R/U with defined scope and justification
01:45-02:00	15	Break	
02:00-02:30	30	Your own case: size and peer review	Total K/R/U and scenario
02:30-03:05	35	VP/SE and management's prioritization meeting	A justified choice among projects
03:05-03:40	35	Phase follow-up and an unexpected result	Frozen baseline, variance, and a new decision
03:40-04:00	20	Teaching assessment and implementation plan	Owner, next phase review, and skills feedback

Instructions and answer key for the SE exercise

Start with the training exercise: 75 delivery hours, 30 employees attending for two hours, 10 hours of internal preparation, and approximately $1,800 for an external instructor. Answer: 145 internal hours, approximately $14,900 in reference resources, and 4.40 SE before risk. Ask an observer to identify possible double counting if preparation is already included in delivery hours.

Then add a separate 25% risk of 40 hours and approximately $1,200 externally. The expected allowance is approximately $1,200 in reference resources. A residual reserve should cover only other unresolved uncertainty; participants must identify it. If they cannot, the reserve is not an approved estimate.

Finally, show the difference between approximately $14,900 in reference resources and cash spending. The company must plan for 145 internal hours plus approximately $1,800 in base external payments; SE is neither an invoice nor a calendar schedule.

Instructions for the prioritization meeting

Assign sponsor, accountable business owner, IT, finance, and project manager roles. Use the five recurring examples or participants' own cases. Begin with the central ratio, then examine ranges, dependencies, time sensitivity, and scarce skills. Introduce a new project with 15 VP and 5 SE. The group should recognize that existing projects' measured values remain unchanged.

Accept a choice in the exercise when the group has explained expected value, remaining effort, and the most important uncertainty. The choice may depart from the ranking, but the rationale must be documented. Translate “it feels important” into a requirement, a time-sensitive consequence, or an explicit strategic preference.

Instructions for phase follow-up

Introduce the surprise: the net gain is 2.4 minutes against a target of 3, a tolerance of ±25%, and a minimum of 2.5. The phase used approximately $19,600 against an estimate of $15,100, with approximately $1,500 in separately approved additional scope. Answer: the value variance is -20%, within tolerance but below the minimum; the size variance is +30% unadjusted and +20% after adjusting for scope, calculated before rounding. This does not automatically justify scaling.

Ask participants to preserve the original baseline, record the observation, and choose to stop, adjust, or run a new bounded test. A revised target must not retroactively make the old forecast look accurate.

After the program: follow-up and skills development

Schedule the first actual phase review within 2-4 weeks, aligned with the project’s pace. Value owners update measurement cards; the project manager brings together SE estimates and risks; leaders confirm the profile and funding. Participants receive spreadsheets, articles, templates, and exercise answer keys.

A future internal instructor should be able to teach one VP example and one SE example and facilitate a decision involving conflicting evidence. Use peer observation and feedback from the first real workshop. Expertise develops through repeated application and critical verification, not through a course certificate alone.

Materials and how they fit together

VP in detail · SE in detail · Decisions and follow-up · Templates · Five complete project examples. The website's short descriptions should point to these two workshops and make clear that practical application requires evidence and management judgment.

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.