Mini Case

(Make sure to read all sections before starting the assignment)

Business Case Background

You have a new job working at a consulting company (ExpertCon Inc.) that help solve a wide range of business problems and challenges that your clients may have. Clients range from small business to individuals seeking help in analyzing their data. The data may be captured from different sources and in different format – in other words the data may not be complete or clean. Your first week was a full week of training. The training mainly focused on how to resolve analytical problems using Excel, and how to create a database in Access to manage and capture future data.

During your second week, your manager Maria see's that you are learning fast and thinks you are ready to handle your first client. He gives you a briefing of the client's company background, then he sends you an email cc'ing the client, informing them that you will be the focal point who will handle the company's portfolio.

Problem Description

In the email, you find the following problem description of your client:

Dear John

We were informed by Maria (you manager) that you will be working on our projects. We are happy that you will be our portfolio manager and excited to work with you on a number of business-related problems that will help us (managers and executives) make more data-supported decisions for the continued growth of our company and satisfaction of our clients. We have a large amount of data that we continue to capture and which we are interested in analyzing. Our data comes from multiple sources such as customer feedback, surveys, and internal operations.

We (FitnessRus) are a new startup company that is building fitness centers throughout Canada. FitnessRus headquarters is in Toronto, Ontario and we operate a chain of fitness centres in Ontario. We also plan to expand our centers into other provinces in Canada, which after successful expansion, expand even further to the United Stated.

Our managers are collecting data to be used in preparing their *annual profit plan* for the coming year. The cost of the equipment maintenance over time needs to be determined. The accountant suggested the use of a linear equation for the equipment maintenance costs. Data regarding the equipment maintenance hours and costs for the past year are as follows.

Your client also asked if you could predict the average cost per month during the year to better help predict next year's costs.

Best Regards
Andrew, Planning Division, Head

Data Set

In the email, you also see this data set as an attachment to the problem description:

Data set 1: Annual Profit Plan

Month	Maintenance service (hrs)	Equipment Maintenance costs ($)
2016		
January	840	3200
February	400	2000
March	230	1550
April	1250	3500
May	480	2450
June	2570	4550
June	320	1800
August	450	2100
September	450	2450
October	960	3100
November	2440	4100
December	330	1750
2017		
January	520	4,470
February	4900	4,260
March	300	2,820
April	500	4,350
May	310	2,960
June	4800	4,200
June	320	3,000
August	400	3,600
September	4700	4,050
October	350	3,300
November	340	3,160
December	320	3,030

Portfolio background

In doing some research of the company and as part of your information gathering on your client, you found the following. FitnessRus is a fitness company founded in 2004. The goal of the company is to create a friendly environment for all gym junkies while offering premium training facilities. Their slogan is "no breaks for the weights" and their fitness center offers state of the art training equipment and are quick to replace/fix any broken equipment. Due to the slogan,

FitnessRus is heavily focused on having all their equipment's working and requires more maintenance than most gyms. Before expanding and looking for new locations to open their fitness centers, FitnessRus needs to assess if their current business model is sustainable. Their first step in their assessment is to look at their maintenance fees to evaluate yearly costs.

Requirements

The problem presented here can have two levels of complexity in terms of analysis and presentation. In other words, the criteria identified below will determine the effort put and the quality and rigor it takes to complete the assignment.

Scenario A: Low Rigor Level	
• Word file:	~1000 words
• Figures:	2 or more figures
• Tables:	2 or more tables
• Excel:	Create cells; graphs; trendline; insert formula; if-the-else function; insert some statistical functions such as average explain graphs
Scenario B: High Rigor Level	
• Word file:	~3000 words
• Figures:	4 or more figures
• Tables:	4 or more tables
• Excel:	Create cells; graphs; trendline; insert formula; vlookup if-the-else function; insert some statistical functions such as average; identify intermediate steps in different sheets; show decision making process; interpret results
• Access:	Create tables; populate with data; relationships; forms; reports; at least 3 SQL statements;

Guidelines

From your training, you remember that the solution procedure for each client will not be straight forward with a set of steps to follow as each of their problems will be different. However, you remember the basic guidelines your trainer taught you when looking for a solution:
1) Type the data in Excel
2) Organize your data with titles
3) Add tables, charts and functions if needed
4) Add columns and rows when needed to help your analysis (sums, averages, etc)
5) Structure your analysis so your client can understand how you came to the solution
6) Highlight the cell which contains the answer(s) to your client's problem(s)

For Scenario B:
You were also trained on Access to create a database that will help your client better capture, integrate and analyze future data sets. You remember that your trainer also gave you some guidelines for creating an Access database:
1) Identify all fields needed in the data set (columns)
2) Start by creating your tables (database)
3) Create forms to help capture the data
4) Create relevant reports for your clients

Analysis Steps

Your manager made it clear and explicit that you need to document (with brief explanation) the steps you took in order to solve your client's business problem (you can keep the steps short and basic, you do not need a paragraph for each step):
1) …
2) …
3) …
4) etc.

Decision

You will need to explain to your client the solution you found for their problem (what was your logic, the premise of your decision, your alternative solutions, the recommended solution and why you recommended that solution). Your manager also asked if you could create a short PowerPoint slide to help explain your decision to your client.