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| A close up of a logo  Description automatically generated | Case Study – WORLDUCATION |

Worlducation is a social startup that manufactures tablet computers for primary school students. They not only focus on the hardware, but they also have a competitive team creating software, content and activities to better engage and educate the students.

Worlducation aims to change the way children learn at school by implementing artificial intelligence technology that can follow up on each child’s progress and adjust to their needs as they learn, creating the optimal path learning experience.

So far, Worlducation only sells their tablet computers business to business (B2B) as they realised that their content and hardware proved most effective when a whole classroom was using it, and a teacher was coordinating the activities. Also, this helped the sales team focus on larger sales, and minimised the potential number of problems that could arise from individual customers. However, the long-term plan is to also tackle a business to consumer strategy (B2C).

What makes Worlducation completely different from their competition is that they envision a world in which every child learns how to read and write – a world without illiteracy. Given this vision, for every classroom that buys their products, they donate and train a classroom somewhere around the world that can’t afford the same technology. Furthermore, they connect the two classrooms (those who bought the products and services and those who received the donation) so that they can grow together and collaborate throughout their learning cycle.

Worlducation was founded in 2016, and by the end of 2019 they had sold over 35,000 tablets to over 550 schools in 23 countries, generating revenue in hardware sales and software subscriptions.

Worlducation headquarters are in Sydney’s CBD but they have a development team in Bulgaria, a manufacturing team in Hong Kong, and operation and marketing staff in Colombia, Egypt, Iceland, Russia and the Philippines.

Worlducation started 2020 with a huge sale to a school in Portugal. Although it was a great start, the context for the rest of the quarter was highly uncertain due to COVID-19. Surprisingly the pandemic brought hundreds of new leads and that led to an unprecedented growth that brought alongside dozens of operation and production problems.

The factory in Hong Kong closed down for 1 month due to government restrictions limiting supply, the sales team was overwhelmed with sale meetings over ZOOM, the tech-support team had to re-adapt the software to remote learning for many of the schools, and the founders had to start thinking on how education was going to change after this worldwide event.

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| A close up of a logo  Description automatically generated | Strategic and Operational Plan 2020 – 2022 |

Welcome

Welcome to the Strategic and Operational Plan for Worlducation.

This document sets out our vision for the next two years and how we hope to achieve it.

We hope you enjoy reading this document.

Lucas Lopez

CEO

Worlducation

Executive Summary

Founded in 2016, Worlducation is a social startup that manufactures tablet computers for primary school students. Our focus is not only on the hardware, but also creating software, content and activities to better engage and educate primary school students.

Worlducation aims to change the way children learn at school by implementing artificial intelligence technology that can follow up on each child’s progress and adjust to their needs as they learn, creating the optimal path learning experience. Worlducation envisions a world in which every child learns how to read and write – a world without illiteracy. This is why, for each classroom that buys our product, we donate and train a classroom somewhere around the world that can’t afford the same technology. We then connect the classrooms together so that they can grow and collaborate throughout their learning cycle.

Vision Statement

To see a world without illiteracy.

Mission Statement

To be the change and facilitate a world without illiteracy by changing the way children learn at school and the number of schools that have access to technology.

Our values are:

Core values underpinning our activities are:

* Ethical principles
* Innovation
* Collaboration.

Strategic Priorities

* To be well led, high performing, profitable and accountable.
* Ensure that all financial operations, performance indicators and results support the strategic policies
* Identify new and expand existing sources of revenue and ways to help more classrooms in need
* Achieve profits of at least 10% per annum.

Increase our reach

* Increase range of products and services offered to reach a larger target market
* Increase sales to increase donations to needy classrooms.

Continue building deeper customer relationships

* Customer-centred practice, with a focus on meeting their total needs for high-quality technology
* Strengthen the skills of our people, to better support customers
* Have an effective help desk function in order to meet customer needs
* Strengthen the effectiveness of internal customers through provision of effective systems within each team
* Drive innovation to better meet customer demands.

Attract, engage and develop the best staff

* Continuing the drive to a customer centred, high performance workforce and culture
* Strengthening the skills of our people, to better support customer needs
* Empowering innovation and responsiveness to change
* Continuing to enhance the diversity of our workforce
* Exploring the use of technology in human resources.

Our organisation structure

Senior Management consisting of the CEO and General Manager heads up the overall organisation.

The company consists of key teams as follows:

* Sales Team consisting of the Sales Manager and 3 x Sales Representatives
* Operations Team consisting of the Operations Manager, Administration Officer and Accounts Officer.
* IT Team consisting of the IT Manager, IT Support Officer and Help Desk Officer.

Each team develops its own performance plan each year for the upcoming 12 months. Each team is expected to:

* Set its overall objectives to align with its key function and our strategic directions.
* Define overall responsibilities according to the function within the company.
* Set outcomes.

The Market

The technology market is a growing and ever-changing industry due to the rapid rate that technology is being updated. Emerging technologies include artificial intelligence and the Internet of Things (IOT). There is an increasing focus on cyber security.

Due to the global pandemic, the issues with the manufacturing industry have impacted on the supply of hardware components.

The trend for consumer spending during the pandemic has taken a downturn but this has not affected the ICT industry as due to more people working from home, consumer appetite for tablets has increased.

Situation Analysis

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| **Strengths** | **Weaknesses** |
| * Value and quality * Strong management * Customer loyalty * Friendly organisational culture * Level of available finance for investment | * Brand name not developed as well it could be * Growing organisation |
| **Opportunities** | **Threats** |
| * Schools needing to upgrade technology * Opportunities to offer a range of services * Opportunities for synergies across all services and products | * High level of competition * Economic downturn meaning less spent generally * Failing to satisfy clients demands |

Marketing Strategies

Our marketing strategies aim to:

* Build our brand
* Generate leads now
* Convert those leads quickly
* Have every part of the business supporting each other

We plan to develop our market share by:

* Improving our marketing and advertising
* Continually improving the quality of service given to clients
* Maintaining effective communication channels with all stakeholders to ascertain industry requirements and then develop products and manage services accordingly
* Continually improving communication channels with all our stakeholders, ensuring a flow of timely and accurate information to facilitate effective planning and decision making
* Targeting identified growth markets with planned, market appropriate campaigns employing a variety of promotional strategies and advertising mediums
* Offering attractive fee structures to our clients
* Continually improving the skills, knowledge and effectiveness of our team through our commitment to training and development
* Regularly reviewing the effectiveness of all our operations and making improvements when and where necessary

Collaboration

As a company we focus on collaboration both within and outside of the company. Currently our external partners are:

* Lion Marketing – our marketing agency
* IT Biz Solutions – Internet Service Provider and web hosting.
* Oz Aid – informs of us education projects in need.

Key projects

The following key projects will commence in 2021:

Due to global economic conditions, a wait and watch attitude is being adopted while we brainstorm and provide cost estimates for future business models. Options include establishing a second manufacturing facility (estimated cost $5 million), outsourcing manufacturing to a third party (lost margin of $200 per unit sold or $2 million per year assuming 10 000 units are sold), developing a cloud based solution where customers can access the software remotely on their own devices (estimated cost of $2 million), purchasing off the shelf tablets (lost margin of $300 per unit sold or $3 million per year) or repurposing used tablets ($100 per unit sold or $1 million).

Operational Plan (focus on 2021)

As an introduction to the Operational Plan, it is important to understand the following information.

Worldcation has a complex supply chain that begins when a sale is made usually via a sales representative or through an online enquiry that is handled by the sales team. Sales are recorded in an internal Enterprise Resource Planning System (ERP System) which notifies the operations team that an order needs to be delivered. The operations team verify the sales order and authorise the delivery of a manufacturing request to the factory in Hong Kong. Manufacturing team in Hong Kong notes the order specifications and delivery details and incorporates this within its production schedule. The order is manufactured and the operations team arrange freight and shipping directly to the customer.

Since COVID-19 and the closure of the factory due to government restrictions, of the 2000 tablets due to be shipped by April 20, only 500 were completed on schedule.

In the past, senior executives have met to brainstorm and provide cost estimates for future business models. Options included establishing a second manufacturing facility (estimated cost $5 million), outsourcing manufacturing to a third party (lost margin of $200 per unit sold or $2 million per year assuming 10 000 units are sold), developing a cloud based solution where customers can access the software remotely on their own devices (estimated cost of $2 million), purchasing off the shelf tablets (lost margin of $300 per unit sold or $3 million per year) or repurposing used tablets ($100 per unit sold or $1 million).

Our people

Our people skills are as follows:

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| CEO: Lucas Lopez | Established the company. Social entrepreneur with experience in establishing a number of companies. Spent 10 years working a volunteer in Africa. |
| General Manager: Irene Green | Former high school principal with a strong social conscience. Member of 2 NGO Board. |
| Sales Manager: Jade Somers | Strong sales history having worked in sales roles for the last 15 years. Loves to inspire the sales team to do their best. Always interested in learning and improving skills. Goal for this year is to increase the sales team. |
| Sales Representative: Jay Santos | Has been with the company for six months. Jay speaks several languages which assists with communicating with customers in a range of companies. |
| Sales Representative: Jane Stone | New to sales but loves learning. Wants to do more sales training to make sure she can used tried and tested sales methods. |
| Sales Representative: Jala Singh | Has been in sales for 10 years, also within the ICT industry. Loves talking to people and has shown himself to be an engaging public speaker at various staff events. Could move more into this promotional/public relations role. |
| IT Manager: Hal Hyland | Joined the company recently. Has been in the IT industry for 10 years. Interested in cloud technology. Currently studying a Masters of IT part-time. |
| IT Support Officer: Helen Hunt | Strong experience in IT support for the last 5 years. Good with customers and solving problems. Currently studying a Bachelor of IT part-time. Interested in cloud technology and the power of technology to host virtual events. |
| Help Desk Officer: Hayley Hill | Recently joined the company. Has an IT background, as well as customer service background. Always puts the customer first. Somewhat frustrated by the rather inefficient systems in place for help desk support. |
| Operations Manager: Albert Biden | Highly efficient in organising and scheduling. His background in as a high level public servant. |
| Accounts Officer: Alicia De Souza | Alicia is a trainee also studying accounts administration. She is an excellent team player and already bringing insights to the role. |
| Administration Officer: Alan Ibrahim | Highly efficient in organising and scheduling. Has a good eye for systems and procedures. A great team player. Studying for a Diploma of Business Administration in his spare time. |

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| A close up of a logo  Description automatically generated | **Staff Code of Conduct** |

Purpose

This code aims to guide the conduct of staff in the performance of their duties as an employee of Worlducation. It is intended to provide practical assistance for staff faced with ethical challenges.

Overview

All staff of Worlducation are expected to perform the duties associated with their position skilfully, impartially and diligently in order to contribute to the efficient and economic achievement of Worlducation’s strategic goals.

Staff should be guided in their conduct by the principles established by this code. If there is any doubt as to the applicability of the code, or the appropriate course of action to be taken in certain circumstances, the matter should be discussed with a senior member of staff.

Code

Ethical principles

The fundamental ethical principles on which this code of conduct is based are:

* respect for others
* integrity
* diligence
* economy and efficiency.

Respect for others

All staff are expected to treat others, including other staff and customers, with fairness and respect. This involves:

* courtesy and responsiveness in dealing with others
* being sensitive to and respecting the rights and dignity of others
* making reasonable, fair and consistent decisions
* avoiding behaviour which might reasonably be perceived as harassment, victimization or intimidation
* avoiding discrimination on grounds such as age, race, sex, pregnancy, sexuality, ethnic background, nationality, disability, political conviction, religious belief, or other grounds covered by relevant legislation
* allowing alternative points of view to be expressed and reasonably debated.

Integrity

All Worlducation staff have an obligation as a citizen and as an employee to observe the laws of the State and the Commonwealth.

Staff are required to be familiar with, and comply with, all relevant Worlducation policies, procedures and codes of practices of the organisation.

Conflicts of interest

Staff should be honest in performing their role and avoid conflicts between their private interests and those of their responsibilities to Worlducation.

Conflicts of interest may arise when a staff member is in a situation where personal circumstances are affected by the decisions or duties carried out in their role. A conflict may arise when any of the following are involved:

* financial interests
* personal or sexual relationships
* personal beliefs
* outside employment
* political participation
* use of confidential information
* use of facilities, equipment and resources
* acceptance of gifts or benefits.

All staff must act responsibly and report any actual or perceived conflicts of interest that arise as part of their role. If there is any question as to whether a conflict exists, staff must discuss the circumstances with management to determine whether a conflict exists. Appropriate strategies will be developed to manage any reported or perceived conflicts of interest.

Diligence

5Staff are expected to carry out their duties in a professional, ethical and diligent manner at all times. This means staff must:

* make decisions fairly, impartially and without bias, using the best factual information available
* keep records and documentation to support their decisions
* always aim to achieve the highest possible standard of performance
* continuously develop their knowledge in their professional fields and areas of responsibility. Trainers and assessors must continue developing their vocational competencies to support continuous improvements in the delivery of the services provided by Worlducation
* exercise best judgment in the interests of Worlducation
* maintain adequate documentation to support decisions made
* ensure outside interests do not interfere with their ability to meet the responsibilities of their role
* adhere to professional codes of conduct and standards of ethics
* act responsibly when becoming aware of any unethical behaviour or wrong doing by any other person. This may involve a report to a senior member of staff or to external authorities.

Economy and efficiency

Staff should use Worlducation resources, facilities and intellectual property only for legitimate purposes related to their role with Worlducation.

Staff should avoid waste or minimize it where avoidance is not possible.

Staff should maintain sufficient security and protection of Worlducation property, facilities, resources and intellectual property.