Case Study Assignment Template   
[Case Study Customer]

[Create a copy of the Case Study Template

* To edit, download or make a copy. Save the file to your Microsoft Desktop or One Drive or to your Google Drive if you are using the Google Editor Suite.
* Give your template copy a unique file name so that you can easily find it and upload it for submission later, for example, “Course 1\_Case Study Assignment\_YourInitials”.
* You can use this template as a shell to develop your case study assignment submission, or, if you prefer, as a working document.
* Identify the customer story you have selected in the template sections indicated with “[ ]”, for example [Case Study Customer], [Customer you selected], [SAP Customer Story URL], etc.
* Completed examples are shown for each step to get you started and provide a guide for the expected response.
* If this template copy will become your final assignment document, don’t forget to delete the instruction sections in gray text and the highlighted starting point examples.
* Be sure to proofread your work so that it is ready to submit to the customer.]

Task 1. Select a Case Study for your Assignment

[The first task is to choose a case study for your assignment from the [SAP Customer Stories website](https://www.sap.com/about/customer-stories.html). On this site, you can search for customer stories by industry, company size, customer country, or the technology or SAP product involved. Use the guidelines set out in the instructions to select a customer story that will help you get the most out of your assignment. Use the table below to document the customer story you are selecting. To get you started, we’ve provided some worked examples selected from the [SAP Customer Stories website](https://www.sap.com/about/customer-stories.html) below.]

My work:

**Customer Story: [**[**Nestlé S.A.: Achieving a global cloud transformation**](https://www.sap.com/about/customer-stories/nestle.html)**]**

**Additional sources:**

[**Video**](https://www.sap.com/assetdetail/2023/05/02cada21-7c7e-0010-bca6-c68f7e60039b.html)

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| Customer profile   * Consumer Products * Region EMEA * Company Size 275,000 | Digital transformation impacts   * Cloud-based IT Infrastructure * Internal Process Optimization * Human Resources Transformation * Enhanced Customer Experience * Improved Business Efficiency and Agility: * Standardization and Process Automation: * Sustainability: * Customer and Cloud-Focused Future |
| SAP solution technology areas  [RISE with SAP](https://www.sap.com/products/erp/rise.html) …  [SAP MaxAttention](https://www.sap.com/services-support/premium-support/maxattention.html)  [SAP Business Technology Platform (SAP BTP)](https://www.sap.com/products/technology-platform.html)  [SAP SuccessFactors](https://www.sap.com/products/hcm.html)  [SAP Commerce Cloud](https://www.sap.com/products/crm/commerce-cloud.html) | Case study material includes   * Videos, text-based information describing SAP engagements * Key customer stakeholders insights * Description of SAP Solution... |

Task 2. Understand the customer and industry context

[In this task you’ll prepare for the engagement by researching the customer’s organization, technology landscape, and industry context, using the customer story materials and other creditable sources. There are four activities to complete:

* Activity 1: Identify five (5) macro business and technology trends impacting the customer’s industry. We’ve provided some examples below. Use at least two sources to confirm the trends you are identifying.
* Activity 2: Describe two (2) motivations the customer may have for doing the project (the “why”)
* Activity 3: Identify three (3) business goals or outcomes the customer wants to achieve by doing the project
* Activity 4: Select two (2) analysis frameworks the project team could use to understand more about the customer’s challenges or objectives and explain why you have selected them.]

**Activity 1: Identify Business or Technology Trends in the Industry**

My work:

**[Nestlé S.A] Macro Trends:**

1. Digitalization and Cloud: Nestlé is utilizing SAP cloud solutions to support the digitalization of analytical processes, customer experience, sustainability tracking, and talent management.
2. Business Process Automation: The company is automating business processes in its operations to create innovative business models on a global scale.
3. [Enhanced Customer Experience: Nestlé has implemented a global platform based on SAP Commerce Cloud to improve customer experience1](https://edgeservices.bing.com/edgesvc/chat?udsframed=1&form=SHORUN&clientscopes=chat,noheader,udsedgeshop,channelstable,ntpquery,devtoolsapi,udsinwin11,udsdlpconsent,udsfrontload,cspgrd,&shellsig=c227bec863fc238e666be4f555ce96960f7d0bf2&setlang=pt-PT&lightschemeovr=1#sjevt%7CDiscover.Chat.SydneyClickPageCitation%7Cadpclick%7C0%7C77386d6f-2cea-46e7-af30-18daa997826a%7C%7B%22sourceAttributions%22%3A%7B%22providerDisplayName%22%3A%22To%20overcom...%22%2C%22pageType%22%3A%22html%22%2C%22pageIndex%22%3A1%2C%22relatedPageUr).
4. [Sustainability: Nestlé is using SAP’s information architecture to optimize its sustainability practices2](https://edgeservices.bing.com/edgesvc/chat?udsframed=1&form=SHORUN&clientscopes=chat,noheader,udsedgeshop,channelstable,ntpquery,devtoolsapi,udsinwin11,udsdlpconsent,udsfrontload,cspgrd,&shellsig=c227bec863fc238e666be4f555ce96960f7d0bf2&setlang=pt-PT&lightschemeovr=1#sjevt%7CDiscover.Chat.SydneyClickPageCitation%7Cadpclick%7C1%7C77386d6f-2cea-46e7-af30-18daa997826a%7C%7B%22sourceAttributions%22%3A%7B%22providerDisplayName%22%3A%22Nestl%C3%A9%20has...%22%2C%22pageType%22%3A%22html%22%2C%22pageIndex%22%3A1%2C%22relatedP).
5. Business Agility and Resilience: The transition to SAP S/4HANA Cloud aims to increase business agility and resilience.

**Sources:** [[Reference](https://www.sap.com/about/customer-stories/nestle.html)]

**Activity 2: Identify Customer Motivations**

[In this activity you will describe two (2) motivations for the customer to do the project (the “why”). These drivers could be associated with the industry trends you identified in Activity 1, other market pressures, the customer’s digital transformation goals etc. Being able to identify the customer’s motivations will help you to articulate the value of the SAP project to the customer’s business and stakeholders.]

My work:

In the [**Nestlé S.A**] customer story, the customer’s motivations are:

* Strengthening IT Infrastructure: Nestlé aimed to build an IT infrastructure that could support its global scale and complexity, ensuring the company remains agile and resilient in a rapidly changing market.
* Enhancing Business Processes: The company sought to automate business processes and integrate cloud solutions to create innovative business models on a global scale, improving efficiency and decision-making capabilities. These motivations align with Nestlé's goals of maintaining its competitive edge and supporting a future-ready workforce through excellent employee experiences and efficiency at scale.

**Activity 3: Identify the Customer’s Business Goals**

[In this activity, identify three (3) business goals or outcomes the customer wants to achieve by doing the project.   
  
Hint: Typical business goals for a customer going through digital transformation might be:

* Reduce total cost of ownership of IT and business systems
* Improve customer response times or ‘stickiness’ (customer returns to purchase again)
* Reduce time or cost to complete transactions or access data
* Improve visibility and quality of decision-making data
* Improve customer engagement or remove roadblocks to interacting with customer
* Meet relevant compliance or quality guidelines (for example, General Data Protection Regulation (GDPR) data privacy in the European Union, US Securities and Exchange Commission (SEC) requirements, International Organization of Standardization (ISO) standards etc.)
* Reduce errors
* Improve integration with or retire legacy systems
* Improve recovery time to business as usual when a system goes down
* Automate processes
* Enhance security to prevent losses from hacks and attacks]

My work:

In the [**Nestlé S.A**] customer story, the customer’s business goals are:

* Reduce Costs: Lower the total cost of ownership for IT and business systems.
* Enhance Customer Experience: Improve response times and engagement, encouraging repeat business.
* Boost Efficiency: Reduce the time and cost to complete transactions and access data, while improving the quality of decision-making data.

**Activity 4: Identify Analysis Frameworks**

[Recall that an analysis framework is a process or approach you can use to solve problems and design solutions. To refresh your understanding of the analysis frameworks covered in this course, see Module 2, particularly Lessons 1 and 2.

1. Select two (2) analysis frameworks you could use to understand more about the customer’s business goals and challenges from the frameworks discussed in this course:

* Design thinking
* Systems thinking
* SWOT analysis model
* VUCA analysis model
* PESTLE analysis model
* Systems Diagrams (BPMN Notation)
* Six Sigma process analysis

1. Write a short paragraph explaining why you have selected these two (2) analysis frameworks. Asking yourself the following questions could help develop your response: ***“What are the key elements of the framework? What are the benefits of using it for this customer engagement? What will I uncover about the customer’s environment by using these frameworks? Are there any analysis gaps or considerations when using this framework?”***
2. Optional: complete a SWOT analysis for your customer story (if you have not already selected SWOT analysis as one of your framework options above]

My work:

a) Design Thinking e Análise SWOT

(b) O Design Thinking é escolhido por sua abordagem centrada no ser humano, que auxilia na identificação de necessidades não atendidas dos clientes e na criação de soluções inovadoras. É particularmente útil para aprimorar a experiência do cliente e desenvolver novos produtos ou serviços. A Análise SWOT, por outro lado, fornece uma visão clara das forças, fraquezas, oportunidades e ameaças internas e externas, permitindo uma avaliação estratégica que pode informar a tomada de decisões e o planejamento estratégico.

|  |  |
| --- | --- |
| Strengths   * Forças (Strengths): Infraestrutura de TI robusta, presença global, forte marca. | Weaknesses   * Fraquezas (Weaknesses): Dependência de sistemas legados, complexidade operacional. |
| Opportunities   * Oportunidades (Opportunities): Crescimento do mercado digital, demanda por produtos sustentáveis. | Threats   * Ameaças (Threats): Concorrência intensa, vulnerabilidades de segurança cibernética. |

Task 3. Build your project team

[This task is about identifying and helping to build the ideal project team to deliver the implementation described in the customer story you selected. There are four activities:

* Activity 1: Identify the role you have selected (for example, Technical, Functional, Data Analyst, Project Manager, Business Process Consultant, or Architect) and why you have chosen it.
* Activity 2: Describe your key responsibilities and the skills or expertise you’ll bring to the project team
* Activity 3: Identify the other project roles and skills/expertise you think will be needed to deliver the SAP implementation set out in the customer story and explain why
* Activity 4: Explain how the team you have identified will work together to deliver the SAP implementation set out in the customer story you selected.]

**Activity 1: Identify your role on the project team and why you have chosen it**

[Identify the role you have selected (for example, Technical, Functional, Data Analyst, Project Manager, Business Process Consultant, or Architect).]

My work:

I will be [Role] on the [Customer story] project team. I have chosen this role because [Reason].

For Activity 1, if I were to select a role on a project team, I would choose the role of Data Analyst. This role aligns with my capabilities to analyze and interpret complex data, which can be crucial for making informed decisions during a project. As a Data Analyst, I would be responsible for collecting, processing, and performing statistical analyses on large datasets. I would bring expertise in identifying trends, patterns, and insights that could help guide the project’s strategic direction and achieve its objectives. My ability to handle vast amounts of information and provide clear, actionable insights would be invaluable in supporting the project team’s success.

**Activity 2: Describe the skills and expertise you’ll bring**

[For the role you have selected, describe your key responsibilities and the skills/expertise you’ll bring to the team.]

My work:

As a [Role] I will work with the [Customer] team to understand….This could involve…

The key skills I will bring to the project are:

* As a Data Analyst on the project team, my key responsibilities would include:
* Data Collection: Gathering data from various sources to ensure a comprehensive dataset for analysis.
* Data Cleaning: Preprocessing and cleaning data to ensure accuracy and reliability.
* Data Analysis: Using statistical methods to analyze data and extract insights.
* Data Visualization: Creating visual representations of data to identify trends and patterns.
* Reporting: Compiling analytical reports that convey complex data in an understandable manner.
* The skills and expertise I would bring to the team encompass:
* Analytical Skills: Proficiency in statistical analysis and the ability to interpret data trends.
* Technical Expertise: Knowledge of data analysis tools and programming languages such as SQL, Python, and R.
* Attention to Detail: Ensuring data integrity and accuracy in analysis.
* Problem-Solving: Identifying issues within datasets and finding solutions.
* Communication: Ability to explain data insights to non-technical team members and stakeholders.

**Activity 3: Identify the skill and expertise mix needed for the project**

[Identify the other project roles and skills/expertise you think will be needed to deliver the SAP implementation set out in the customer story and explain why.]

My work:

To deliver the [Customer] SAP implementation, the ideal project team would include the following roles and mix of expertise/skills:

For the SAP implementation project, a diverse mix of skills and expertise is essential to address the various aspects of the project. Here are the roles and their corresponding skills/expertise needed:

* SAP Solution Architect: To design the overall SAP solution that aligns with business goals, ensuring scalability and integration with existing systems.
* SAP Functional Consultants: Experts in specific SAP modules to configure the software according to business needs.
* SAP Technical Consultants: To handle custom development, scripting, and technical challenges that arise during implementation.
* Business Analysts: To translate business requirements into technical specifications and ensure that the SAP solution meets business needs.
* Change Management Specialist: To manage the organizational change, ensuring smooth adoption of the new system by all users.
* Project Coordinator: To assist the Project Manager with administrative tasks, scheduling, and resource allocation.
* Quality Assurance Analysts: To test the SAP solution thoroughly and ensure it meets quality standards.
* Training Specialist: To develop training materials and conduct sessions to educate users on the new system.
* Data Migration Specialist: To oversee the transfer of data from legacy systems to the new SAP environment, ensuring data integrity and accuracy.

**Activity 4: How the team will collaborate**

[Explain how the team you have identified will work together to deliver the SAP implementation set out in the customer story you selected.]

My work:

The team will collaborate to deliver the SAP implementation through a structured approach that emphasizes communication, coordination, and integration of each member’s expertise:

* Regular Meetings: The team will hold regular meetings to discuss progress, address challenges, and ensure alignment with the project goals.
* Project Management Tools: Utilization of project management software to track tasks, deadlines, and responsibilities.
* Collaborative Platforms: Use of collaborative platforms for document sharing, real-time updates, and maintaining a central repository of project artifacts.
* Cross-functional Workshops: Conducting workshops where team members from different functions come together to understand each other’s roles and how they intersect.
* Clear Communication Channels: Establishing clear lines of communication to facilitate the exchange of ideas and feedback among team members.
* Agile Methodology: Implementing agile practices to allow for iterative development and flexibility in responding to changes.
* Risk Management: Proactively identifying potential risks and developing mitigation strategies as a team.
* Quality Assurance: Integrating quality assurance processes throughout the implementation to ensure the solution meets the required standards.

Task 4: Develop an executive summary deck to present to the customer

[In this task, you’ll develop an executive summary deck to present your key findings as you would to a real customer. Developing a deck is recommended as this is the most commonly used format on customer projects and a good opportunity for you to practice your presentation skills. However, if you prefer, you can also present your work by writing a short report precis (executive summary) setting out your key findings and recommendations.

* Create a new file in either MS PowerPoint or Google Slides to develop your deck. If you are writing a report precis, use MS Word or Google Docs. You can select any design look and feel but consider that this is a document that will be presented to a customer in a professional context. For a refresh on professional writing skills, and working with Microsoft Office Suite, see Module 2 Lesson 3.
* Save the file to your local drives. Give your executive summary deck or report precis a unique file name so that you can easily find it and upload it for submission later, for example, “Course 1\_Project Submission Deck\_YourInitials”.
* Remember you are developing a summary, which means distilling the key points for your customer – ideally, it should be no more than 5 slides or 1 page (~300 words) of written text. See the example outline below for an executive deck
* Hint: To guide you, here are some tips on developing an effective deck:
  + Follow the assignment structure – for example, develop an introduction slide setting out the SAP customer story and implementation, and then use one slide per task, summarizing your key findings from each activity only, close with a summary or next steps slide
  + Use short simple sentences where possible
  + Use subheadings and headings to organize and highlight your key points
  + Include 5-7 points per slide only as this is the maximum information a typical audience retains at a time
  + Create a logical story and add visuals where possible to engage with your audience
  + Adopt a clean, professional design look and feel (for example, choose simple fonts, colors, etc. that are readable and accessible)]

My work:

Develop an executive summary deck (MS PowerPoint or Google Slides) or report precis (MS Word or Google Docs).

Slide 1: Introduction

**Title**: Executive Summary of SAP Implementation

[**Subtitle**: Nestlé S.A.'s Global Cloud Transformation1](https://edgeservices.bing.com/edgesvc/chat?udsframed=1&form=SHORUN&clientscopes=chat,noheader,udsedgeshop,channelstable,ntpquery,devtoolsapi,udsinwin11,udsdlpconsent,udsfrontload,cspgrd,&shellsig=c227bec863fc238e666be4f555ce96960f7d0bf2&setlang=pt-PT&lightschemeovr=1#sjevt%7CDiscover.Chat.SydneyClickPageCitation%7Cadpclick%7C0%7C30028642-e1d1-4ceb-ad2d-fe5d8702f70d%7C%7B%22sourceAttributions%22%3A%7B%22providerDisplayName%22%3A%22Nestl%C3%A9%20S.A...%22%2C%22pageType%22%3A%22html%22%2C%22pageIndex%22%3A1%2C%22relatedP)

[**Overview**: Brief introduction to Nestlé’s journey and objectives with SAP solutions2](https://edgeservices.bing.com/edgesvc/chat?udsframed=1&form=SHORUN&clientscopes=chat,noheader,udsedgeshop,channelstable,ntpquery,devtoolsapi,udsinwin11,udsdlpconsent,udsfrontload,cspgrd,&shellsig=c227bec863fc238e666be4f555ce96960f7d0bf2&setlang=pt-PT&lightschemeovr=1#sjevt%7CDiscover.Chat.SydneyClickPageCitation%7Cadpclick%7C1%7C30028642-e1d1-4ceb-ad2d-fe5d8702f70d%7C%7B%22sourceAttributions%22%3A%7B%22providerDisplayName%22%3A%22Explore%20Ne...%22%2C%22pageType%22%3A%22html%22%2C%22pageIndex%22%3A1%2C%22relatedPageUr).

Slide 2: Project Team Roles

**Title**: Project Team Composition

**Roles Identified**: Data Analyst, SAP Solution Architect, Business Analyst, etc.

**Purpose**: Each role’s contribution to the project’s success.

Slide 3: Key Findings

**Title**: Analysis and Insights

**Data Analysis**: Summary of data-driven insights and trends.

**Business Goals**: Outline of Nestlé’s business objectives with the SAP implementation.

Slide 4: Challenges and Frameworks

**Title**: Strategic Frameworks Utilized

**Design Thinking**: How it shaped the project approach.

**SWOT Analysis**: Key strengths, weaknesses, opportunities, and threats.

Slide 5: Summary and Next Steps

**Title**: Moving Forward

**Achievements**: Recap of milestones reached.

**Next Steps**: Outline of upcoming phases in the project.

Task 5: Record your presentation to the customer

Record a short video or audio track (3-4 minutes, .mp4 or .wav file) of yourself presenting your key findings and recommendations to the customer. You will complete a self-evaluation check of your presentation in the project submission. It is optional to upload the actual recording file. You can record the presentation on your phone or use a more formal recording set-up if you wish. If you prefer not to appear on camera, record an audio track only.

Hint: To guide you, here are some tips for recording engaging videos or audio:

* Before you start, develop a high-level script or outline setting out what you need to cover, following the assignment structure you built into your deck or precis
* Introduce yourself and the role you are playing on the project briefly then explain the purpose of the presentation before going into detail
* Clear a space for your recording session with no distractions
* Speak clearly, not too fast
* If you’re recording a video, ensure you are in frame and that the camera is aligned with your face and body position (for example, the camera is not pointing up your nose or cutting you off)
* Use a simple background so that the focus is on you, not your surroundings (for example, a wall or quiet room)
* Do a few sample recordings first to test out your set-up and recording quality
* To assist you, try presenting to somebody off-camera

My work:

Record your presentation to the customer either as a video or audio track. Be ready to complete a self-evaluation of your presentation in **Project Submission and Peer Review**.