**Business Case**

**EZ-maintenance**

**VanHorn Solutions LLC**

**406 Montana Ave**

**Helena 59601**

**03/01/2024**

**Table of Contents**

1. Executive Summary 3

1.1. Issue 3

1.2. Anticipated Outcomes 3

1.3. Recommendation 4

1.4. Justification 4

2. Business Case Analysis Team 5

3. Problem Definition 5

3.1. Problem Statement 6

3.2. Organizational Impact 6

3.3. Technology Migration 7

4. Project Overview 7

4.1. Project Description 8

4.2. Goals and Objectives 8

4.3. Project Performance 9

4.4. Project Assumptions 9

4.5. Project Constraints 10

4.6. Major Project Milestones 10

5. Strategic Alignment 11

6. Cost Benefit Analysis 11

7. Alternatives Analysis 13

8. Approvals 13

* **Executive Summary**

This business case outlines how the EZ-maintenance Project will address current business concerns, the benefits of the project, and recommendations and justification of the project. The business case also discusses detailed project goals, performance measures, assumptions, constraints, and alternative options.

* Issue

Site maintenance personnel need to be able to focus on problem-solving. Logistics cost these personnel a lot of time. The skills required for a good troubleshooting expert can be very different from those involved in things like billing, inventory, and similar logistics.

* Anticipated Outcomes

The anticipated outcome is a comprehensive app that automates the repetitive, time-consuming responsibilities of the maintenance workers. This app should benefit the business by increasing the billable hours of maintenance and increasing their efficiency which will translate into higher profits and easier onboarding.

* Recommendation

This project will address the problem by creating an app that helps manage logistics for field workers. Desirable results will be achieved by introducing the elements of the app one at a time in an agile methodology. Each step of the process will be accompanied by a trial period to assess the functionality and the concerns of the maintenance workers.

* Justification

This project should be implemented because it will be industry specific. Alternatives will be generalized use-cases, where this option will be tailored to the industry from the beginning and will improve efficiency accordingly.

* **Business Case Analysis Team**

|  |  |  |
| --- | --- | --- |
| **Role** | **Description** | **Name/Title** |
| Executive Sponsor | Provide executive support for the project | Kayla, Rada, CEO |
| Technology Support | Provides all technology support for the project | Clayton DeSimone, Head Developer |
| Process Improvement | Advises team on process improvement techniques | Tyler Coenen, Process Team Lead |
| Project Manager | Manages the business case and project team | Zack Nikkel, Project Manager |
| Software Support | Provides all software support for the project | Paul Morgan, Software Group Lead |

* **Problem Definition**
* Problem Statement

The business problem that this project is intended to address is as follows: too much of the on-site service industry workload is dedicated to repetitive logistics that don’t cost much labor time or involve high skilled work. The field workers should not have to spend their time and energy categorizing their labor and materials or planning their routes.

* Organizational Impact

The proposed project will affect the organizational processes by cutting out the unskilled labor involved in site visitation. This streamlining should allow for more field workers to be brought on board since less paid time will be dedicated to the menial tasks. Retention and worker satisfaction should also increase since the actual work in the field will more closely reflect the job description.

* Technology Migration

The migration process will involve both office staff and field workers. Filling out the database of customer information, materials and training information will involve an up-front labor cost. If users are migrating from similar software the tool will be able to automate the migration and handle most edge-cases. If the user is moving from pen and paper, the process will be more involved as documentation will need to be scanned and more manual data entry will be required. Users will also need to be provided with a device capable of interacting with the app.

* **Project Overview**

This program will consist of several free-standing elements. The training module, the customer management module, the inventory and billing module, and the mapping module.

* Project Description

This project will consist of an app, a database, and a server. The field workers will have access to the app to interact with the server and database that will be relatively lightweight so that their clients can be inexpensive devices. Administrators will be able to alter the database structure and create quiz and training materials with the field workers having access to that information and limited database modification abilities.

* Goals and Objectives

|  |  |
| --- | --- |
| **Business Goal/Objective** | **Description** |
| Timely and accurate reporting | App based tool will allow real-time and accurate reporting of all payroll and administrative metrics |
| Improve staff efficiency | Fewer hours spent on logistics allow for more field worker positions |
| Reduce employee turnover | Greater autonomy and flexibility will address employee concerns and allow managers to focus on billable tasks |
| Reduce overhead costs | Fewer staff hours will help maximize billable time |

* Project Performance

|  |  |
| --- | --- |
| **Key Resource/Process/Service** | **Performance Measure** |
| Reporting | The app-based system will reduce reporting discrepancies (duplicates and gaps) and require reconciliation every 6 months instead of monthly. |
| Timesheet/Admin data entry | Eliminate managers’ non-billable work by allowing employees to enter their data directly. |
| Software and System Maintenance | Decrease in cost and staff requirements as system maintenance will be reduced from once every month to once every 6 months with the new system. |
| Staff Resources | Increase field staff positions |

* Project Assumptions

Project assumptions are as follows. High internet availability across the service area. Field staff have basic technological skills. Business falls within the target customer base.

* Project Constraints

The preliminary constraints of the proposed project are as follows: The front end needs to be accessible with mobile devices. The modules need to be clearly delineated. The server and database need to be secure and should ideally be local. The backend should also be lightweight to minimize server costs.

* Major Project Milestones

|  |  |
| --- | --- |
| **Milestones/Deliverables** | **Target Date** |
| Project Charter | 01/01/20xx |
| Project Plan Review and Completion | 03/01/20xx |
| Project Kickoff | 03/10/20xx |
| Phase I Complete | 04/15/20xx |
| Phase II Complete | 06/15/20xx |
| Phase III Complete | 08/15/20xx |
| Phase IV Complete | 10/15/20xx |
| Phase V Complete | 12/15/20xx |
| Closeout/Project Completion | 12/31/20xx |

* **Strategic Alignment**

|  |  |  |
| --- | --- | --- |
| **Plan** | **Goals/Objectives** | **Relationship to Project** |
| 20xx VanHorn Solutions Field work management | Improve record keeping and information management | This project will allow for real-time information and data entry, increased information accuracy, and a consolidated repository for all payroll and administrative data |
| 20xx VanHorn Solutions Field work management | Create new technology to support company and department missions more effectively | New technology will allow many payroll and administrative functions to be automated reducing the levels of staff required to manage these systems |
| 20xx VanHorn Solutions Strategic Plan for Human Capital | Engage the workforce and improve employee retention | This project allows the employee to take an active role in managing his/her payroll and administrative elections |

* **Cost Benefit Analysis**

|  |  |  |  |
| --- | --- | --- | --- |
| **Action** | **Action Type** | **Description** | **First year costs (- indicates anticipated savings)** |
| Create new app platform | Cost | Initial investment for Project | $400,000.00 |
| Software installation and training | Cost | Cost for IT group to install new software and for the training group to train all employees | $100,000.00 |
| Increase staff by 3 employees | Savings | An immediate reduction in overhead equal to the annual salary of 3 HR specialists and 2 payroll analysts. | -$183,495.00 |
| Field workers no longer required to work non-billable payroll and administrative tasks | Savings | Field workers currently average 16 hours per week non-billable time. It is anticipated that this number will be reduced to no more than 2 hours per week. At an average of $36.00 per hour this results in ($36.00 x 14 hours/wk reduced non-billable time x 18 managers) $9072.00 increased revenue per week. | -$471,744.00 |
| System maintenance required every 6 months instead of monthly | Savings | Less frequent use of IT resources working on non-value added tasks results in approximately $42,000 savings per year. | -$42,000 |
| Reduce employee turnover by 10% | Savings | Savings in cost to out-process exiting employee and recruit, hire, and train new employees is approximately $50,000 in the first year. | -$50,000 |
| **Net First Year Savings** |  |  | **$247,239.00** |

* **Alternatives Analysis**

|  |  |
| --- | --- |
| **No Project (Status Quo)** | **Reasons For Not Selecting Alternative** |
| Keep the legacy system in place | * Unnecessary expenditure of funds for increased staffing levels * Continued occurrence of a high number of data errors * Poor and untimely reporting * Lack of automation |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |
| Outsource the implementation of a web-based platform | * Significantly higher cost * Expertise already exists in house * Vendor’s lack of familiarity with our internal requirements |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |

* **Approvals**

|  |  |  |  |
| --- | --- | --- | --- |
| **Approver Name** | **Title** | **Signature** | **Date** |
| Hallinan, B. | President and COO |  |  |
| Steinwand, B. | Executive VP |  |  |