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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. 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 below.]

My work:

Customer Story: [Customer you selected], [SAP Customer Story URL]

Customer profile - … - … - ...	Digital transformation impacts - … - … - ...
SAP solution technology areas - … - … - ...	Case study material includes - … - … - ...

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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:

[Industry] Macro Trends:

1. [Trend 1 (for example, …)]
2. [Trend 2 (for example, …)]
3. [Trend 3 (for example, …)]
4. [Trend 4 (for example, …)]
5. [Trend 5 (for example, …)]]

Sources: [Source 1], [Source 2]

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 [Selected Customer Story] customer story, the customer's motivations are:

- [Motivation 1]
- [Motivation 2]

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 [Selected Customer Story] customer story, the customer's business goals are:

- [Business Goal 1]
- [Business Goal 2]
- [Business Goal 3]

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.

(a) 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

(b) Write a short paragraph explaining why you have selected these two (2) analyses 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?"***

(c) 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) To understand more about the customer's business goals in the [Selected Customer Story], I have selected [Framework 1] and [Framework 2].

(b) I chose the [Framework 1] because [Reason]. I think that…
I chose [Framework 2] because [Reason]. I think that…

(c) SWOT Analysis (Optional)

Strengths - … - … - …	Weaknesses - … - … - …
Opportunities - … - … - …	Threats - … - … - …

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].

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:

- [Skill 1] [Reason]
- [Skill 2] [Reason]
- [Skill 3] [Reason]

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:

- A [Role] with […] experience who would …
- A [Role] with […] experience who would …
- A [Role] with […] experience who would …

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 [Customer] SAP implementation by:

- Example …
- Example …
- Example …

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).

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**.