**Business Case**

**Communication Flow for Company Events**

**Travelport**

**9200 E Panorama Cir #200**

**Centennial, CO 80112**

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# Executive Summary

This section should provide general information on the issues surrounding the business problem and the proposed project or initiative created to address it. Usually, this section is completed last after all other sections of the business case have been written. This is because the executive summary is exactly that, a summary of the detail that is provided in subsequent sections of the document.

This business case outlines how using Microsoft Power Automate to streamline SAFe course enrollment will be significantly more beneficial to use than the current system of manual enrollment. The process that is currently being used does not send any sort of communication between the filer and the organizer, at least without explicit action taken by the organizer. This leads to low turnout with poor communication flow. By using MS Power Automate, this will speed up the process by making things more efficient and have a higher return due to people remembering to show up to the training events.

## Issue

This section should briefly describe the business problem that the proposed project will address. This section should not describe how the problem will be addressed, only what the problem is.

Travelport has a lot of benefits towards their employees. They invest in the growth of their employees by offering many development and training sessions. Yet, while many people sign up for the training and development sessions, too often they forget to show up or cannot show up because there wasn’t an automated calendar block and other events took priority. Currently the sign-up form is done through MS forms and once the person hits submit, that is it. There is no confirmation email sent to the trainee and the calendar is not blocked for the training session. Likewise, in order to assess who signed up to attend the course, the administrator must go directly to the Forms response. For the person teaching the course, it is disheartening and frustrating when a training class is not being taken advantage of. This wastes time, effort and money from both parties.

## Anticipated Outcomes

This section should describe the anticipated outcome if the proposed project or initiative is implemented. It should include how the project will benefit the business and describe what the end state of the project should be.

By using Microsoft Power Automate to create a SAFe Course Enrollment System, we will improve the efficiency of the enrollment process while also increasing user engagement on behalf of both the administrators and the enrollees. In doing so, these courses will be better attended and organizing the course will require less overhead. In addition, the use of Power Automate will come at no additional cost as it is included in the Office 365 suite of products. Thus, should the system prove to be effective for both enrollees and administrators, it will have a net benefit for Travelport with minimal cost.

## Recommendation

This section summarizes the approach for how the project will address the business problem. This section should also describe how desirable results will be achieved by moving forward with the project.

In general, this project was intended to function as an improvement on the existing system of SAFe enrollment with minimal impact on user interaction and course administration. Of the variety of solutions to this problem that were weighed, the use of Power Automate presented itself as both the most cost effective and the easiest to integrate into the current enrollment system. It will ensure that enrollees get a calendar invite to the course that contains the relevant WebEx or Teams meeting link, all provided after they fill out a familiar form that has been used to enroll employees in SAFe training up to this point. In addition, course administrators will have access to a SharePoint site that provides a master list of attendees and can easily add or remove courses as necessary through a series of small changes to the form and .ics files in SharePoint.

## Justification

This section justifies why the recommended project should be implemented and why it was selected over other alternatives. Where applicable, quantitative support should be provided and the impact of not implementing the project should also be stated.

The utilization of Power Automate is a free service already provided to us by Travelport. This is cost efficient as we do not have to purchase any other programs, learn to use those systems, and figure out how to integrate it with our current tools. This is time efficient and can be done in one program. Other programs were looked at, but do not provide the full scope of what can be done. The other programs could send out a calendar invite, but no email notification or vice versa. Some other programs could do exactly what Power Automate could do, but we would have to migrate to their email service and application. Nobody wants to do that.

## 

# Problem Definition

## Problem Statement

This section describes the business problem that this project was created to address. The problem may be process, technology, or product/service oriented. This section should not include any discussion related to the solution.

Ariel and Kristen were looking for a solution to minimize the amount of time spent sending back and forth emails to schedule employees for SAFe training. They want an email confirmation with a calendar invite to be sent to someone after they submit a form indicating which training slot they want to sign up for.

## Organizational Impact

This section describes how the proposed project will modify or affect the organizational processes, tools, hardware, and/or software. It should also explain any new roles which would be created or how existing roles may change as a result of the project.

Using Power Automate will improve services at Travelport. No extra tools, hardware or software will be needed to use this service. No new roles or existing roles will be added or changed. All it will take is either a 10-minute training video or reading through the step-by-step process included in this document.

*The WP Project will impact Smith Consulting in several ways. The following provides a high-level explanation of how the organization, tools, processes, and roles and responsibilities will be affected as a result of the WP Project implementation:*

*Tools: the existing legacy administration platform will be phased out completely as the WP Project is stood up and becomes operational. This will require training employees on the WP tools and their use in support of other organizational tools.*

*Processes: with the WP Project comes more efficient and streamlined administrative and payroll processes. This improved efficiency will lessen the burden on managers and provide autonomy to employees in managing their administrative and payroll tasks and actions.*

*Roles and Responsibilities: in addition to the WP Project allowing greater autonomy to employees and less burden on managers, the manpower required to appropriately staff human resources and payroll departments will be reduced. While we greatly value our employees, the reduction of non-billable overhead positions will directly reflect in our bottom line and provide an immediate return on our investment. The new platform will be managed by the IT group and we do not anticipate any changes to IT staffing requirements.*

*Hardware/Software: in addition to the software and licensing for the project, Smith Consulting will be required to purchase additional servers to accommodate the platform and its anticipated growth for the next 10 years.*

# Project Overview

This section describes high-level information about the project to include a description, goals and objectives, performance criteria, assumptions, constraints, and milestones. This section consolidates all project-specific information into one chapter and allows for an easy understanding of the project since the baseline business problem, impacts, and recommendations have already been established.

The SAFe registration project overview provides detail for how this project will address Travelport's SAFe registration problem as well as any other future registration that will be offered. The overview consists of a project description, goals and objectives for the SAFe registration project, project performance criteria, project assumptions, constraints, and major milestones. As the project is approved and moves forward, each of these components will be expanded to include a greater level of detail in working toward the project plan.

## Project Description

This section describes the approach the project will use to address the business problem(s). This includes what the project will consist of, a general description of how it will be executed, and the purpose of it.

The SAFe registration project seeks to replace the current manual system of enrollment in SAFe courses with a more automated and user-friendly system. Microsoft’s Power Automate provides a readily available means of creating this automated system that will seamlessly integrate Office 365 products already in use at Travelport. This involves hosting a Microsoft Form on a SharePoint site where Travelport employees can provide the necessary data and be sent a calendar invite to their Outlook account while being added to an Excel spreadsheet containing all attendees for all events.

This project will result in greater efficiency in creating and promoting SAFe Courses on behalf of course organizers, lowering overall costs of administering such courses. Additionally, organizers will have greater flexibility in what courses are listed and who can sign up for those courses. Once implemented, o

*will review and analyze several potential products to replace Smith Consulting’s legacy payroll and administration mainframe system with a web-based platform. This will be done by determining and selecting a product which adequately replaces our existing system and still allows for growth for the next 10 years. Once selected, the project will replace our existing system in a phased implementation approach and be completed once the new system is operational and the legacy system is archived and no longer in use.*

*This project will result in greater efficiency of day to day payroll and administrative operations and reporting, significantly lower overhead costs, and reduced turnover as a result of providing employees with greater autonomy and flexibility. Additionally, managers will once again be focused on billable tasks instead of utilizing a significant portion of their time on non-billable administrative tasks.*

*Smith Consulting will issue a Request for Information in order to determine which products are immediately available to meet our business needs. Once the product is acquired, all implementation and data population will be conducted with internal resources.*

## Goals and Objectives

This section lists the business goals and objectives which are supported by the project and how the project will address them.

*The WP Project directly supports several of the corporate goals and objectives established by Smith Consulting. The following table lists the business goals and objectives that the WP Project supports and how it supports them:*

| **Business Goal/Objective** | **Description** |
| --- | --- |
| Timely and accurate reporting | Web based tool will allow real-time and accurate reporting of all payroll and administrative metrics |
| Improve staff efficiency | Fewer HR and payroll staff required for managing these activities will improve efficiency |
| Reduce employee turnover | Greater autonomy and flexibility will address employee concerns and allow managers to focus on billable tasks |
| Reduce overhead costs | Fewer staff required will reduce the company’s overhead |

## Project Performance

This section describes the measures that will be used to gauge the project’s performance and outcomes as they relate to key resources, processes, or services.

*The following table lists the key resources, processes, or services and their anticipated business outcomes in measuring the performance of the project. These performance measures will be quantified and further defined in the detailed project plan.*

| **Key Resource/Process/Service** | **Performance Measure** |
| --- | --- |
| Reporting | The web-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 | Elimination of 5 staff positions in HR and payroll which are no longer required as several functions will now be automated. |

## Project Assumptions

This section lists the preliminary assumptions for the proposed project. As the project is selected and moves into detailed project planning, the list of assumptions will most likely grow as the project plan is developed. However, for the business case there should be at least a preliminary list from which to build.

The following assumptions define what is needed for the Power Automate SAFe Enrollment System to be effective.

* + Administrators know how to create calendar events, add those courses to the enrollment form, and view list of attendees
  + Employees have knowledge of where enrollment SharePoint site is located and have access to it
  + Tutorial exists for training administrators
  + Enrollment system supports all possible courses and can apply to all employees

## Project Constraints

This section lists the preliminary constraints for the proposed project. As the project is selected and moves into detailed project planning, the list of constraints will most likely grow as the project plan is developed. However, for the business case there should be at least a preliminary list from which to build.

Current constraints are limited to the general usability of the Power Automate solution in addition to difficulty in adding functionality. This entails both the training of administrators in creating, modifying, and monitoring course enrollment as well as preparing employees to effectively use the enrollment form for enrolling and unenrolling in courses. New features must be added through Power Automate which requires training in Power Automate development and hours committed to building the new feature.

## Major Project Milestones

This section lists the major project milestones and their target completion dates. Since this is the business case, these milestones and target dates are general and in no way final. It is important to note that as the project planning moves forward, a base-lined schedule including all milestones will be completed.

*The following are the major project milestones identified at this time. As the project planning moves forward and the schedule is developed, the milestones and their target completion dates will be modified, adjusted, and finalized as necessary to establish the baseline schedule*.

| **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

All projects should support the organization’s strategy and strategic plans in order to add value and maintain executive and organizational support. This section provides an overview of the organizational strategic plans that are related to the project. This includes the strategic plan, what the plan calls for, and how the project supports the strategic plan.

//Give the 411 on what our plan is

//need to fill in timeline

Travelport’s four values are:

1. Put People First
2. Keep Things Simple
3. Be Bold to Win
4. Stay One Step Ahead

| **Plan** | **Goals/Objectives** | **Relationship to Project** |
| --- | --- | --- |
| Search For Automated email options | -Have at least two other possible resources for automated registration. | Look for other backup plans in case Power Automate ends up being to difficult to implement or nonfunctional. |
| Attempt template creation for sending automated Calendar invited | -Get a template for creating automated emails through a selection in forms. | Creating a basic template for email automation through a form will allow ariel and her team to create automated registration for anything, not just safe training. |
| Finalize and adjust in accordance with the project requirements. | -Show Ariel and Kristen how to use the template for whatever registrations they need to schedule | It should provide Ariel and Kristen with an automation solution to end up saving them countless time in busywork and further streamline the process of signing up for safe training. |

# Cost Benefit Analysis

Many consider this one of the most important parts of a business case as it is often the costs or savings a project yields which win final approval to go forward. It is important to quantify the financial benefits of the project as much as possible in the business case. This is usually done in the form of a cost benefit analysis. The purpose of this is to illustrate the costs of the project and compare them with the benefits and savings to determine if the project is worth pursuing.

The only cost to this plan is the initial cost of time and effort to understand and set up the Power Automate flow, the calendar file types, and how they work with the Microsoft Form. By following the tutorial provided for administering this system, course organizers can easily perform all necessary duties SAFe course enrollment demands. These include adding courses by adding a file to SharePoint and modifying Form items, monitoring course attendees through SharePoint, and customizing email responses.

The benefits far outweigh the costs, as we should be able to spend far less time in the future managing emails and scheduling. Though this tool comes at no price, there is an implicit cost in the time necessary to understand and familiarize oneself with the system. However, the simplicity with which a new user can learn this, particularly with easy access to tutorial materials, means that this training cost is minimal and comparable to any other available system.

# Alternatives Analysis

All business problems may be addressed by any number of alternative projects. While the business case is the result of having selected one such option, a brief summary of considered alternatives should also be included—one of which should be the status quo, or doing nothing. The reasons for not selecting the alternatives should also be included.

The following alternative options have been considered to address the inefficiencies in the SAFe enrollment system. We recommend improving on the current system through the developed Power Automate flow but suggest that external tools be considered as well. Note differences in cost and user experience when weighing options.

| **No Project (Status Quo)** | **Reasons For Not Selecting Alternative** |
| --- | --- |
| Maintain the current manual enrollment system | * Enrollment requires manual addition of employees to a course based on forms completed. * Creation of a course involves duplicating a form and creating a new calendar event. * Complicated and confusing, leads to frustration for administrator and enrollees if steps aren’t taken * Excessive man hours costs company |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |
| Use a third-party tool (I.e., EnrollWare) | * Monthly costs ranging from $100-$300 depending on needed functionality * Not able to update tool as needed for our purposes * Training in using new system for administrators and enrollees |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |
| Outsource development of Power Automate system | * Upfront cost for contractor * No guarantee it will fit requirements * Similar system could be developed in-house for less cost |

# Approvals

The business case is a document with which approval is granted or denied to move forward with the creation of a project. Therefore, the document should receive approval or disapproval from its executive review board

The signatures of the people below indicate an understanding in the purpose and content of this document by those signing it. By signing this document you indicate that you approve of the proposed project outlined in this business case and that the next steps may be taken to create a formal project in accordance with the details outlined herein.

|  |  |  |  |
| --- | --- | --- | --- |
| **Approver Name** | **Title** | **Signature** | **Date** |
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