Team Four Milestone 1

██████████, ███████████████, Nicholas Ellis

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Executive Summary

Our team has been tasked with the responsibility of designing and providing a budget for the IT infrastructure of Geezertown Investments' newest corporate office, located in Aynor, South Carolina. This will include a network, telephone system, and computer/mobile devices for employees; additionally, we are detailing plans to account for interruptions of normal office operations to ensure business continuity. To better understand the scope of our project and ensure that we meet both explicitly stated and implied requirements of the company, we have created an outline to compartmentalize key information.

Geezertown Investments is a financial service company that helps seniors make the most of their retirement funds; they pride themselves on immediate customer service either via telephone or at home meetings with staff. The summary provided of the business and job roles, as well as the stated expectations, has led us to assumptions regarding the overall scope of our project. This includes deciding which details and items we are responsible for, what features are most important to stakeholders, and making assumptions regarding the regular workflow of the company. This is made easier by better understanding who our stakeholders are and what aspects of the design are most important to them. Stakeholders consist of IT staff, call center associates, management, senior consultants, investors, regulators and clients. What features or components of the infrastructure the stakeholders value ranges from consistent web access, reliable IT infrastructure, speed and quality of work. We must take each of these stakeholders and their desires into account when drafting our design.

Finally, we must account for potential contingencies regarding the project, including service outages, software and hardware malfunctions, cybersecurity threats, and human error, among others. With the given location of Aynor, South Carolina, we are under threat of power outages or heavy rain which could lead to downtime or damaged equipment. By assessing these risks and anticipating the worst, we can plan preventative measures to ensure minimal downtime and ensure fast, reliable service.

Scenario Summary

Geezertown Investments is a growing financial service company that specializes in helping senior citizens to enjoy their retirement through personalized travel experiences, lifestyle investments, and strategic asset planning. The company operates many offices with dedicated call centers located throughout North America while its main corporate office is based in Syracuse, New York. Due to rapid growth and a desire to expand into warmer, more comfortable climates, the company decided to open a new office in a location with pleasant weather and less snowfall.

As a part of this expansion strategy, Geezertown Investments has selected Aynor, South Carolina as the site for its new office location. This location was chosen due to its potential to support long-term growth and its popular retirement communities. The new office will easily allow the company to improve workflow optimization and better service by launching operations in a high-value market. The new corporate site will consist of 100 employees, which includes 60 call center associates, 20 traveling senior lifestyle consultants, 10 IT staff members, and 10 management team members. During daily operations, employees will work together to achieve the company's mission of providing quick, personalized service to its senior clientele.

To assist its operations, Geezertown Investments requires a strong and reliable IT infrastructure to ensure everything is programmed smoothly. Key components like telephone systems, network designs, mobile/desktop devices, and secure VPN access for consultants are all factors that would cause a great impact on its infrastructure. The IT staff will work in different shifts to provide coverage from 5AM to 9PM, Monday through Friday. At the new site, they are responsible for maintaining and troubleshooting all software, hardware, and networking equipment used by employees across departments.

Overall, the new office in Aynor, South Carolina signifies a strategic expansion for Geezertown Investments to provide superior services for senior clients in North America. With a committed team amongst IT, management, and consulting, the company is ordered to maintain its commitment to business productivity as things grow.

Assumptions

As part of our planning process, our team has come to several assumptions regarding our responsibilities and the overall scope of the project. These assumptions include but are not limited to determining the requirements, goals, acceptability standards, and logistics of our clients and their operations. Our team is expected to find solutions that lead to the most consistency, highest performance and the lowest rates of downtime possible at a reasonable cost. We understand that we may need to provide alternative solutions if asked for a variety of reasons, including costs. Our understanding is that the 'extensive internal analysis' conducted by the company has found that each of the proposed locations meets the basic requirements of the company. This may include cost, service availability, proximity to clients, and general stakeholder satisfaction; however, we do account for these considerations when planning the IT infrastructure.

We assume that, despite not being explicitly stated, the budget should also consist of items related to the network such as wireless access points, printers, and software or cloud memberships. This may include tools related to network security and backing-up data to ensure security and continuity of business processes. Additionally, our budget includes costs of contingency plans considering the likelihood of outages caused by storms and natural disasters. However, this does not include extraneous network-related devices such as IoT devices like security cameras; while we do account for compatibility concerns and the desire for future implementation of such systems, they are not our primary concern. We are not responsible for expenses pertaining to company logistics, such as transportation of consultants and necessities such as furniture and office supplies. It is our understanding that any expenses brought on by additional training requirements for software or hardware are already covered by the company are not to be included in the budget, though it is factored into our plans.

Stakeholders

Stakeholders	Purpose	Requirements
Call Center Associates	- Assist with investment decisions, ordering commemorative items, and booking trips for travel. - Use desktops, headsets, the internet, and web applications to access calls.	- Reliable headsets & equipment. - Extremely strong and constant internet connection.
Management Team	- Oversee daily operations, ensure the company is moving smoothly, and support employee performance. - To achieve this, the management team uses IT systems like computers and phones for reporting and communication.	- Access to important web applications. - Plenty of communication tools (Microsoft teams, Google, Outlook) - Protected mobile network access.
Service Providers	- Supply/support software, internet services, hardware, and digital communication in order to maintain the office's IT infrastructure.	- Include important technical requirements.
Clients	- Clients fund our business - Feedback helps us make decisions	- Fast and reliable Assistance - Immediate support
Corporate IT Department & Staff	- Manage and support the IT infrastructure in the company as well as security and cloud services framework.	- Ensure reliable connection between offices and secure VPN access for mobile users. - Reliable IT infrastructure.
Senior Consultants	- Utilize mobile devices with cellular access and VPN to connect with the company's network.	- Reliable devices (computers, tablets, phones). - Consistent cellular connection.
Investors	- Invest in our company to help us meet our goals	- Prefer increase profit margins - Interested in the value and ratings of our company and services
Regulators	- Ensure that we are in compliance with laws and regulations - Ensure that both us and clients are protected	- Compliance from our company on laws and regulations - Transparency regarding developments in our business

Potential Contingencies

As Geezertown Investments prepares to open a new office in Horry County, South Carolina, it is important to think about possible problems that could interrupt business operations. These problems could stem from nature, technology, people, or outside systems. In this section, our group identifies the main risks that may affect the new location and could require backup plans in the future. Through listing off potential contingencies, we better prepare ourselves for instances where regular business operations are halted and better understand the scope of our project.

Natural Disasters (Hurricanes and Tropical Storms)

Horry County is located near the coast of South Carolina, which means it is at risk for hurricanes and tropical storms, especially during the summer and fall. These storms can bring strong winds, heavy rain, and flooding; A storm might damage the office building, cause long power outages, or create hazardous driving conditions, making it unsafe for employees to come to work. The summers in South Carolina can get very hot. If the building's air conditioning stops working, the heat can damage computers and make it hard for people to work inside the office. Towns like Conway and Loris can flood easily, or sometimes even frost over - this makes it hard for consultants to meet with clients for in-home consultations. Water damage or heat causing harm to computers, phones, and other office equipment, and weather conditions preventing people from safely getting to work are concerns we cannot avoid given the location.

Technology and Infrastructure Problems (Power Outages)

The area can sometimes lose power due to storms or problems with the electrical grid. If there are no backup generators or battery systems, the office could lose internet, phones, and computers for hours or even days.

Network, Software and Hardware Issues

One of our primary concerns is to prevent technological issues; this includes hardware failure, software crashes, and internet or network issues If computers, servers, or networking equipment break, employees may not be able to work until they are fixed or replaced. Without extra equipment or a fast way to get replacements, this can cause delays. The company uses special web-based tools for managing clients and operations; if these tools crash or have bugs, employees won't be able to access customer information or do their jobs. If the internet goes down, call center workers and managers won't be able to do their jobs. Traveling consultants also need reliable cellular service to connect back to the office.

Cybersecurity Threats (Hacking and Viruses)

Because the company deals with personal and financial information, it is a target for cyberattacks. This includes phishing emails, viruses, malware or ransomware that could lock important files. These attacks could result in stolen data, disruption of regular business operations, and form distrust in our clients and shareholders. It is essential for us to keep security measures and continuity plans in mind while drafting up our budget.

Human Error & Staff Shortages

Sometimes, employees make mistakes such as deleting files, clicking on bad links, or sharing private information by accident. These mistakes can create serious problems, especially if they involve customer data or business systems. We may also have to consider the possibility of ordered items being delayed, broken, or malfunctioning, preventing us from completing within our timeframe. If numerous employees were to leave the company or get sick at the same time, it may be hard to keep up with the daily work. This could interrupt the quick and outstanding service and support of customers that Geezertown prides themselves in.