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**Digital Acquisition Professional Program Case Study Challenge - Phase 2**

## Case Study Title: "Navigating Stakeholder and Decision-making Challenges"



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## I. OVERVIEW

This case study reflects an authentic scenario that Acquisitions professionals could experience when procuring digital services. It is intended to simulate the conditions faced when acquiring digital assets and the associated risks and barriers presented by diverse stakeholders with varied personalities and perspectives. Learners are provided a comprehensive view of the situation, along with details regarding each stakeholder group and objective data to support their concerns in acquiring the new software. They will be prompted to consider relevant policies, procedures, and opportunities to source additional data, to further align their approach with the requirements.

### Approach & Delivery Format

The scenario presented in this case study is designed to be universally applicable to a variety of government agencies. It is designed for flexibility in delivery mode and the time allotted to complete it. Each milestone includes a percentage of time needed to complete the analysis allowing for a flexible delivery over days, weeks, or more. The exercise also includes facilitator instructions and tips for delivery. Learner instructions guide them through navigating the case study and completing each exercise milestone.

Learners will analyze proposed solutions, considering the benefits and drawbacks of each option. There is no single correct solution for this case study, and learners will be encouraged to explore the many potential pathways, and consider them using tools that include a cost-benefit analysis and a Strengths - Weaknesses - Opportunities - Threats (SWOT) analysis to uncover additional insights. Based on their analyses and feedback from peers and the facilitator, learners will propose a creative solution with a written analysis and a final presentation.

The exercise is broken down into five milestones to engage learners as they fully analyze the scenario while receiving feedback throughout the experience. This encourages learners to adjust their positions as they learn new information, gain additional insights, and further develop their approach. Their final proposed solution will be presented in a simple slide deck format and should reflect an innovative and creative approach that considers the needs of the stakeholders, the challenges and barriers presented, and the benefits gained.

## II. THE EXERCISE

### ➢ Facilitator Instructions

**Prepare for Delivery**

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Review the case study background information, key stakeholders, problem identification, data, and evidence carefully. Familiarize yourself with the potential solutions and challenges presented through the scenario.

Consider how you will distribute the case study exercise to learners.

- **For an in-person, facilitator-led experience**, the case study can be printed and shared with learners before a live session to allow time for review. Links to additional resources are provided within the case study, so learners may need devices to access these online resources.
- **For a virtual facilitator-led format**, electronic versions of the case study may be distributed for download or online viewing.

**Facilitator Tips**
Throughout the case study exercise, you will see Facilitator Tips in blue boxes that provide guidance for facilitators to further engage learners.

**Learner Reflection Exercises**
There will also be points where focused reflection will be suggested in green boxes, and the facilitator can naturally weave those into the activities.

## Introduce the Case Study Exercise

Share the case study below, highlighting the purpose, key issues, stakeholders, and the problem to be solved. Clearly state the learning objectives and the objectives for each milestone.

### Case Study Overview

This case study focuses on the challenges of navigating multi-stakeholder decision-making as an Acquisition team member procuring digital services. This case study focuses on Casey, a federal agency Contracting Officer (CO), tasked with acquiring a cloud-based Customer Relationship Management (CRM) system. While moving through the process of selecting and procuring a service, Casey faces resistance from two key stakeholders: the IT team and Compliance Officers. This case study focuses on how Acquisition officers can consider varying and sometimes opposing needs of stakeholders in the decision-making process.

### Purpose

The purpose of this case study analysis is to consider creative solutions to a realistic scenario learners may encounter as an Acquisition team member procuring digital services, as there is often no single way to solve a problem. In this exercise, learners should carefully analyze the information and research provided and determine a solution that accounts for the varied stakeholder needs involved. Their analysis should include the research or data used to support their solution. To fully analyze the case, learners will engage in several exercises to consider the case from different perspectives using different analysis techniques.

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**Learning Objectives**

After considering this case study and forming a solution, learners will build the skills to:

- Analyze conflicting stakeholder priorities in the CRM acquisition process.
- Evaluate potential solutions for integration and data security.
- Develop a strategy that addresses all concerns and ensures the CRM meets agency requirements.

## ➤ Learner Instructions

**Overview**

In this exercise, you will analyze a case study that presents a real-world scenario. Your task is to critically evaluate the situation, identify the key issues, and develop well-reasoned recommendations. This exercise will help you enhance your problem-solving and decision-making skills as a member of the Acquisition team.

You will also be provided with links to several additional supplemental resources. Use this material to determine the best course of action and as additional guidance in evaluating the situation.

After reading the scenario, you will consider three key questions and use them to support your analysis. These questions will be discussed as a group with your peers and facilitator.

- How can Casey balance the cost and time implications of custom integration solutions?
- What strategies can ensure data security measures do not impact system performance?
- How can Casey mediate stakeholder concerns to reach a consensus?

**Milestone Exercises**

You will complete this case study analysis through several milestone exercises leading to a final proposed solution presentation. Each milestone exercise will be reviewed with your peers and your facilitator. As your analysis progresses, you will use new information uncovered from each milestone to form your final opinion on the appropriate approach to solving the problem presented. There are five milestone exercises: (1) Stakeholder Analysis, (2) Evaluation of Integration Solutions, (3) Evaluation of Data Security Solutions, (4) Written Case Study Analysis, and (5) Final Presentation.

**Facilitator Tip:** Encourage learners to take notes throughout their case study analysis and capture research information. One method to use is the Split Page strategy. using the left side of a page to capture details from the case study and the right side to document notes, research, and ideas.

## III. THE CHALLENGE

Globally, government agencies have been moving to cloud computing, using cloud-based services from outside vendors to allow them to serve their customers more easily and streamline their systems.

Specifically, cloud-based Customer Relationship Management (CRM) systems let organizations grow, respond to change, and save on costs, which helps them provide better services and improve the ways they operate. For example:

- The United Kingdom's Home Office implemented cloud-based CRM systems to better manage citizen interactions and streamline internal processes.
- Australia's Taxation Office (ATO) uses cloud-based CRM solutions to enhance customer service, improve case management, and facilitate better communication with taxpayers.
- Singapore's Infocomm Media Development Authority (IMDA) employs cloud-based CRM systems to engage with businesses and the public effectively, supporting its digital transformation initiatives.

The United States has adopted the same approach to using cloud-based solutions across the government. In October 2018, the Office of Management and Budget (OMB) released the Federal Cloud Computing Strategy, or Cloud Smart, which was part of a Federal government IT Modernization effort. The Cloud Smart initiative fostered a cloud adoption and implementation effort to accelerate the pace of cloud computing software adoption within the federal government. To meet the demands of the initiative, agencies are directed to consider ways to extend their current resources to maximize value, reskill and retain staff, and enhance security situations. The goal of the adoption of cloud computing software is to harness the power of new technologies that expand capabilities within each agency to serve the public.

One successful adoption of a cloud-based CRM within the US government is the General Services Administration (GSA) using Salesforce, a leading cloud-based CRM platform, to manage interactions with various stakeholders and improve service delivery.

The Chief Information Officers Council worked with the OMB, the General Services Administration, and other agencies to determine opportunities for optimizing agency usage of cloud services. One of the opportunities realized was the adoption of Customer Relationship Management (CRM) software to improve shared knowledge across agencies.

Adopting cloud-based systems has its benefits, including centralized access across distributed agencies and teams, streamlined data flows and consolidated information, and smoother service experiences. However, there are also significant drawbacks that cloud computing technologies present, such as security breaches, regulatory compliance, and infrastructure challenges.

Target users for the new system would be broad, including budgeting, contracting, test and evaluation, logistics, human resources, and more. Experience with using and adopting such a system would also vary depending on the agency's and individual's experience using these tools.

The process of acquiring new digital assets like this is a complicated one. Unlike the private sector, the level of coordination and collaboration necessary to ensure the successful adoption within the federal government requires involving many key players and stakeholders, including a CO, a Program Manager (PM), Information Technology (IT), Compliance Officers, and others. Some challenges that can complicate the collaboration across these stakeholders include communication, risk assessment, cost, timelines and schedules, performance, defining requirements, contract type, and solicitation methods. Navigating these complexities requires an analytical mindset to consider many competing priorities and needs of each stakeholder.

**Facilitator Tip:** In the next section, learners are introduced to the players in the scenario. Learners may not be given all the information up front. Remind learners that as they work through the case study, research and other activities may uncover additional information.

## The Players - Part I

### Acquisitions Office: Casey

After more than a decade in acquisitions, Casey, a Senior Acquisition Specialist, is no stranger to complex projects. With Federal Acquisition Certification in Contracting (FAC-C) Level 3 under their belt, Casey has gained a reputation as the agency's go-to expert for acquiring cutting-edge software. But this time, something was different – Casey was handed a project that would push the limits of their expertise: acquiring a cloud-based CRM system.

As Casey left a recent meeting with agency leadership, having received the assignment, a sense of excitement and apprehension stirred. While Casey has acquired many software solutions, acquiring a cloud-based system like this one would be a first. While Casey knows how a CRM generally works, considering the array of implications of this type of cloud-based software starts to become clear. The agency's legacy systems were relics of a bygone era, often barely functional, yet touching them carried massive implications. The questions started swirling:

- Who does this impact?
- How will I establish effective communication among all of these stakeholders?
- Do I need a communication plan, risk management plan, or charter?
- What might the other teams involved be cautious of when approaching this?

Having managed several large IT acquisitions before, Casey knows coordination starts with two key groups: the IT department and Compliance Officers. Casey has a long-standing relationship with both of these departments and a few close colleagues who may be allies as they work through the process.

The challenges of the acquisition aren't just about technicalities. Casey was acutely aware that this project would have ripple effects—some beneficial, some dangerous. If successful, Casey would solidify their standing as a top specialist, potentially opening doors to career advancement. But failure could attract congressional scrutiny and public outcry, not to mention the internal politics of the agency, where trust had been hard-earned. In any contracting

endeavor, vendors who are not selected or those that do not meet small business requirements may post challenges.

Through recent training, Casey has learned that when negotiating among stakeholders, it's important to take an empathetic approach, making sure each stakeholder feels heard and understood throughout the decision-making process.

**Learner Reflection Exercise:** How can Casey use empathy when talking with key stakeholders? How might a lack of empathy create conflict among stakeholders when discussing their concerns?

**The IT Department: Alex**

Alex also has had a long career within IT, transitioning to the federal government several years ago after many years in the private sector, where innovation was faster and less bogged down by bureaucracy. The federal government is an entirely different beast. Alex hears reports from the Chief Information Officers Council and the progress they're making toward the Cloud Smart initiative. While Alex is familiar with it, adoption has been slow across agencies, so direct experience with how such tools integrate into the existing systems is limited. The IT department knows that implementing these solutions has become a priority for many agencies, but integrating cloud-based systems into the agency's legacy infrastructure would be a logistical nightmare. To try to anticipate the challenges these new solutions may present, Alex and the IT team have conducted some preliminary research into the implications of a cloud-based system, but have not shared their findings broadly.

Beyond the technical aspects, Alex has experienced the adoption of new systems before and knows the human element of new software adoption can present significant challenges, including training staff on new software, universal adoption of systems, and the quality and consistency of use. Alex knows plenty of career government employees who are hesitant to adopt any new systems, adapt to change, or consider new approaches. "This is the way we've always done it," is a common phrase Alex hears often when talking about new initiatives or systems.

**The Interaction - Acquisitions Office and IT**

Casey's first move was strategic: to meet with Alex, the IT department's steadfast leader. Having worked together on numerous acquisitions before, Casey and Alex had a rapport built on mutual respect and shared success. But as Casey broached the topic of the cloud-based CRM, Alex's reaction was more restrained than usual.

Casey shares the newest assignment with Alex and asks for feedback. "We've done some initial research," Alex shares, leaning back thoughtfully in the chair. "But the truth is, this cloud solution could create significant challenges. Legacy systems in this agency are over two decades old. Getting them to speak to the cloud—without causing disruptions—won't be easy."

Casey listens closely, knowing that Alex's concerns are valid. But the real issue, Alex notes, is not just technical. "The human element," Alex continues, "that's where we've seen real resistance. You've got career employees who hate change. They'll fight it at every step."

Casey nods, recalling the murmurs of discontent from employees whenever anything new was introduced. But the conversation with Alex has illuminated something deeper: the agency's reluctance isn't just technical, it's cultural.

Alex notes that their experience with adopting cloud-based software has been limited so far. With the newness of the initiative, most agencies haven't gotten as far as the acquisition process.

"I just keep thinking about this integration challenge," Alex continues. "There's been some recent interest and movement, though, that might help you." Alex shares that the Information Technology Category and Cloud Solutions Category Teams have also been working with the OMB to support centralizing information about cloud initiatives and resources for procurement. From that work, they've formed the Cloud Information Center (CIC) and have specifically outlined information for acquisitions. Alex suggests Casey start there for more information on how this impacts the project.

"We're going to need to bring in Compliance, though. We won't get far without them. The good news is, we work pretty closely with each other, so I know where to take this next." Casey asks to be part of those conversations. "It'll be easier if I meet with the Compliance Officer myself. We can usually come to a consensus pretty easily. I'll report back with our thoughts." Casey is mildly concerned and a little put off by the limited engagement with the two teams, but trusts the professional nature of their relationship and knows Alex will perform due diligence.

**Learner Reflection Exercise:** If the next step is a meeting with the Compliance Officers, what is the desired outcome from the meeting, and what should Alex come prepared to discuss? Are there any risks to consider?

## The Players - Part II

### Compliance Office: Riley

Riley is a seasoned Compliance Officer. With nearly two decades of experience, Riley has been participating in the Senior Executive Service (SES) Candidate Development Program, and the eventual promotion and probable appointment to a leadership position would be a distinction for Riley, who has successfully led and managed teams and projects while functioning as a GS-15 within the agency. Riley's current supervisor will continue to monitor performance and may be a good source of support and guidance during this CRM acquisition process.

With the primary job function of examining, evaluating, and investigating whether or not a project or system complies with laws and regulations, Riley and other Compliance Officers know that other teams perceive them as the barriers to projects, presenting the reasons why something cannot be implemented. Being referred to as the "government watchdog" doesn't always leave a good impression. Riley spends the day reviewing various elements of the Federal Acquisition Regulations (FAR) system to confirm any new acquisitions align with the regulations.

As the government has focused on modernizing its systems, reviews and audits have focused on cybersecurity issues and data security, and Riley is keenly aware of these important topics.

### The Interaction - IT and the Compliance Office

Riley sees a meeting request from Alex to discuss a cloud-computing software acquisition. Cloud computing has been on Riley's radar for a few years since the Cloud Smart initiative launched. From a security perspective, Riley and other Compliance Officers encourage agencies to take a risk-based approach when considering cloud solutions. In a report to the President, it was clear that agencies should emphasize "data-level protections and fully leverage modern virtualized technologies." Protecting data is the primary concern for Compliance Officers, generally, but particularly when considering cloud-based solutions.

Riley is relieved to be talking with Alex so early in the acquisition process. The best way to lower risk is to openly communicate and collaborate with the IT team as they think about implementation and infrastructure needs. When they meet, Alex shares the IT team's concerns regarding integration. "The problem," Riley started, "is that we've seen other agencies rush through the cloud acquisition process and end up violating compliance. Contracts were mishandled, data security was compromised, and vendors didn't meet the standards." These concerns are valid, but ones that can be overcome.

For Riley, the larger concern is compliance with the FAR and ensuring data security–these are non-negotiables. One potential significant challenge that comes to mind is the Federal Risk and Authorization Management Program (FedRAMP). FedRAMP will also require a review to ensure that vendors have cleared their security requirements. Moving too quickly through any of these systems opens up the risk for potential security breaches and privacy concerns, ones that raise flags for the Compliance Officers.

"I agree that agencies need to start adopting these solutions," Riley shares, "but, honestly, the security risks have me on high alert." Over a series of meetings, Riley and Alex brainstorm potential solutions, but none of them sufficiently satisfy both party's concerns.

Alex reports back to Casey. "We've been thinking through several options, but this is proving tougher than usual. We're having a hard time coming to a consensus on a single approach." Casey recognizes that negotiation and relationship-building skills would be an asset to these ongoing conversations and proposes an Integrated Project Team (IPT). Casey knows that IPTs provide a more holistic approach to project management, allowing representatives from different areas to effectively work together throughout the project's life cycle. On the other hand, IPTs can be difficult to manage because of diverse team member backgrounds and the need for consensus building. "I really think I can help here," Casey responds. "If the three of us work together, I can learn more about the sources of the issues and their level of impact on any solution we identify."

**The Interaction - Acquisitions Office, IT, and Compliance Office**

During their joint working sessions, Casey asks Alex and Riley to share the major issues the acquisition presents.

"We're talking about major disruptions," Alex warned. "Either we update our legacy systems, which will cost us months, or we risk serious operational downtime with the new cloud system. Any solutions requiring custom integration mean my team will be drained. They all have other duties. Not to mention, they're the ones who have to directly engage with user resistance."

Riley adds, "With proper planning, testing, and cross-departmental coordination, these challenges can be mitigated. We would have to create a strong strategic plan for a successful

implementation. Updating legacy systems to meet the new demands of the cloud system, raises major concerns for me as I think about ensuring regulatory compliance. Newly developed solutions may require compliance reviews, risk management policies, and additional implementation strategies." Alex's face shows some disagreement. "But, updating legacy systems might mean fewer complications because the tools have already been audited and approved." Alex leans back in the chair with arms crossed.

Riles continues, "From a security perspective, whether we update legacy systems or develop newly built custom integrations, data security is a critical concern. In either option Alex has proposed, we'd have to run regular security audits and updates to protect the organization's infrastructure. This would create serious issues with time, resources, and potential disruptions. But, what about developing and implementing advanced encryption and access controls?"

"This might help avert security threats, but encryption would slow everything down. Increased latency, more storage issues, and potential performance crashes. My team has to handle all of that and we just can't take those hits."

Both Alex and Riley believe that their concerns should be the driving influence on the decision-making process.

## Potential Pathways for Solution Development

As the weeks go by, the tension between Alex and Riley simmers just beneath the surface. Both departments are adamant that their concerns should shape the decision-making process. But Casey, with a calm and steady hand, begins to steer the group toward a middle ground. As a group, they determine that there are two options to address each of the larger issues: Integration and Data Security.

1. **Integration Issues:**
    - **Solution A:** Develop custom Application Programming Interfaces (APIs) to integrate the CRM with existing legacy systems. This option is tailored but involves higher costs and longer development time.
    - **Solution B:** Upgrade legacy systems to improve CRM compatibility. This simplifies integration but requires substantial investment and may disrupt operations.
2. **Data Security Concerns:**
    - **Solution A:** Implement advanced encryption and access controls. This ensures strong protection but may affect system performance.
    - **Solution B:** Conduct regular security audits and updates. This maintains data protection standards with fewer immediate impacts on system performance.

**Data and Evidence**

With these proposed solutions in mind, Casey researches some industry white papers and reports, case studies, vendor documentation, academic papers, and IT cost management studies, and finds that:

- **Quantitative data:** Custom APIs will cost 20% more and take 30% longer to implement than system upgrades. Advanced encryption could add 15% overhead to system performance, while regular audits would require additional staffing and resources.
- **Qualitative data:** The IT department suggests custom APIs provide long-term stability but at a higher initial cost. Compliance officers emphasize that advanced encryption is critical for federal data protection requirements, while regular audits are easier to manage but require ongoing attention.

**Learner Reflection Exercise:** There is often more than one possible solution to satisfy the stakeholders and requirements. Are there other solutions Casey has not yet considered?

## ➢ Facilitator Instructions

**Group Discussion**

After learners have read the complete case study, break the group into small teams. Encourage them to identify the main problem(s), analyze the stakeholders involved and their competing priorities, explore the root causes of the issues (including logistical and personal), and develop additional potential solutions.

**Alternative delivery modes:** If delivering the exercise in a virtual experience, teams can be created using virtual breakout rooms. If delivering asynchronously, use tools such as discussion boards to encourage collaboration and discussion among the team members.

After teams have had time to discuss, bring them back together to share their insights with the larger group. Provide feedback or pose additional questions to encourage learners to explore other perspectives or alternative solutions.

**Facilitator Tips:**

- Circulate between groups (if delivering in person) or among breakout rooms (if delivering virtually).
- Each milestone activity has a suggested percentage representing the relative proportion of time to spend on that activity. Adjust actual timing accordingly.

## ➢ Learner Instructions

**Discussion Questions:** Consider the questions below and discuss them with your team.

- How can Casey balance the cost and time implications of custom integration solutions?
- What strategies can ensure data security measures do not impact system performance?
- How can Casey mediate stakeholder concerns to reach a consensus?

**Completing the Analysis:** To complete this case study analysis exercise, you will further analyze the case study and complete a series of milestones. Each milestone provides an opportunity to consider the case study from a new perspective.

- For **Milestones 1, 2 & 3**, you will use various analysis tools to develop a deeper understanding of the stakeholders, their challenges and needs, and the benefits and drawbacks of the proposed solutions.
- For **Milestone 4**, you will complete a written analysis of the case study and develop your proposed innovative solution, using the details from the case study and the additional resources to support your findings.
- For **Milestone 5**, you will develop a presentation slide deck to summarize and deliver your final findings.

**Additional Resources:** Consider these additional resources as you complete each milestone:

- Integration feasibility report and cost analysis
- Data security assessment and encryption impact study
- Federal Acquisition Website
- USDS TechFAR Hub - Get Started
- GAO Cost Estimating and Assessment Guide

## Milestone Exercises

### Milestone 1: Stakeholder Analysis (15%)

**Objective:** Articulate the different perspectives and concerns of stakeholders to better manage their expectations.

To complete this milestone, create a stakeholder map (simplified sample below) to align each group of stakeholders to their levels of influence, needs, concerns, and motivations. Key stakeholders to consider include: IT, Compliance Officers, Users, Management, and others you identify in your analysis (e.g., Executive Leadership, Finance, Human Resources).

| **Proposed Solution:** | | | | |
|---|---|---|---|---|
| Stakeholder or Group | Influence Level (L/M/H*) | Impact Level (L/M/H) | Interest in Proposed Solution | Key Risks and Expectations |
| | | | | |
| | | | | |
| | | | | |

***L/M/H** = Low, Medium, High

### Milestone 2: Evaluation of Integration Solutions (15%)

**Objective:** Evaluate the trade-offs between custom APIs and upgrading legacy systems to make an informed decision.

To complete this milestone, systematically evaluate numerous factors to make a decision that ensures alignment with your organization's strategic goals and operational requirements. For example, you will assess the current state and needs, evaluate custom APIs, create a life cycle cost estimate and also analyze the Strengths, Weaknesses, Opportunities, and Threats (SWOT) of each option provided in the case below. Then make a decision and plan for integrating and monitoring the chosen solution and its performance.

## Milestone 3: Evaluation of Data Security Solutions (15%)

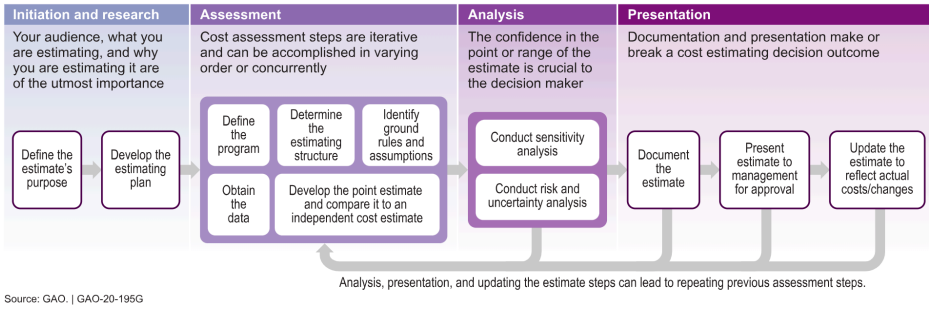
**Objective:** Determine the most effective data security solution that aligns with the agency's needs without compromising system performance.

To complete this milestone, develop a life cycle cost estimate and conduct a SWOT analysis of each option provided in the case below to address the data security challenge.

- **Life Cycle Cost Estimate**

  Developing reliable cost estimates is crucial for realistic program planning, budgeting, and management. While some agency guidelines on cost estimating are thorough, other agency guidance is limited regarding processes, procedures, and practices for ensuring reliable cost estimates. This structured approach ensures that cost estimates are thorough, credible, well-documented, and useful for decision-making.

  Several government agencies are recognized for their leadership in setting standards and providing guidance for cost estimating for digital or IT acquisitions including GAO, USDS, GSA, DoD, and DHS. For this case, the GAO process is presented for consideration. The sample GAO 12-Step Life Cycle Cost Estimate (LCCE) Process visualized below comes from the GAO Cost Estimating and Assessment Guide and addresses the gap between agencies with detailed guidelines and those without. The graphic below is illustrative - please refer to the full size version in the linked Guide.




  The guide outlines key steps in the cost estimating process: the purpose, scope, and schedule of a cost estimate; a technical baseline description; a work breakdown structure; ground rules and assumptions; data collection; estimating methodologies; sensitivity and risk analysis; documenting and presenting results; and updating estimates with actual costs. Note that for this exercise, you do not need to identify specific dollar amounts when considering costs.

- **SWOT Analysis**

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When completing the SWOT analysis, address the considerations for each of the four elements in the diagram below.


## Milestone 4: Written Case Study Analysis (30%)

**Objective:** Craft a well-rounded solution that addresses technical challenges and stakeholder concerns, ensuring successful CRM implementation.

To complete this milestone, use findings from Milestones 1-3 to develop a strategy. Propose a final solution that balances all needs and parties involved.

**An effective analysis of a Case Study includes the following elements:**

| Introduction | Identify Problem | Analysis of Resources & Data | Proposed Solution | Rationale | Conclusion |
|---|---|---|---|---|---|
| Provide a brief summary of the case study, including the main issues and challenges presented. Clearly state the objective of your analysis and your key findings. | Identify and discuss the primary problems or challenges you identified in the case. Explain why these issues were critical to address. Identify any underlying factors or root causes contributing to the problems or challenges. | Evaluate the data and resources provided and use them to identify the strengths and weaknesses of the potential solutions based on the impacts they have on the scenario and key stakeholders. | Present a clear, actionable, and practical solution to address the specific challenges and problems identified. Consider the feasibility and potential impact of your recommended solution and the stakeholder buy-in needed to implement it effectively. | Justify your recommendations based on your analysis of the resources and data from the case. Explain any key considerations as you formed your proposed solution. | Summarize your key findings and restate the significance of your recommended solution. Reflect on the broader implications of your analysis for the organization. |

## Milestone 5: Case Study Analysis Final Presentation (25%)

**Objective:** Effectively communicate the proposed strategy and reflect on the decision-making process to gain insights for future scenarios.

To complete this milestone, prepare a final presentation summarizing your approach, findings, and recommendations included in your final written case study analysis in Milestone 4. Reflect on challenges presented during analysis. Include 6-8 slides that include these sections: Title slide, summary, approach, key challenges, findings, and recommendation.

Your analysis will be assessed on your group's ability to address stakeholder concerns, propose creative yet viable solutions, and justify your recommendations. Effective analysis considers:

- **Stakeholder Management:** Facilitate ongoing discussions with IT and Compliance teams to address concerns and update on progress.
- **Integration:** Opt for custom APIs to integrate with legacy systems, allocating additional resources for development.
- **Data Security:** Implement advanced encryption and schedule regular security audits to ensure protection and compliance.

**Facilitator Tip:** While each milestone could be completed independently asynchronously using the resources provided, ideally learners will present their analyses to the other groups to collect perspectives and feedback from their peers.

## IV. EVALUATION & FEEDBACK

### ➢ Learner Instructions: Evaluation Criteria

The facilitator will evaluate each group's analysis and presentation on a scale of 1-5 (1 = Unsatisfactory, 5 = Excellent) considering the following elements of the exercise:

- **Understanding the Problem:** This criterion assesses how well the analysis identifies and understands the core issues and challenges presented in the case. It includes recognizing the key problems for each set of stakeholders, their implications, and any underlying factors contributing to the scenario.
- **Quality of Analysis:** This criterion looks at the depth and thoroughness of the analysis. It includes how well the analysis examines the evidence, evaluates each proposed solution, and provides a logical and well-reasoned argument. The analysis should be clear, coherent, and demonstrate critical thinking.
- **Use of Evidence and Resources:** This criterion evaluates the extent to which the analysis is backed by credible evidence. It considers how well the analysis integrates data, facts, and research findings to support its arguments and conclusions. Strong use of evidence strengthens the credibility of the analysis.
- **Creativity and Originality:** This criterion assesses the uniqueness and innovativeness of the analysis. It considers whether the analysis offers new insights, creative solutions, or a fresh perspective on the case. Original thinking can add significant value to the analysis.
- **Clarity and Organization:** This criterion focuses on how clearly and logically the analysis is presented. A well-structured analysis should have a clear introduction, body,

and conclusion, with each section flowing logically from one point to the next. The clarity of writing and the organization of ideas are key factors here.

**Facilitator Tip:** Individualized feedback will help learners refine their approach as they prepare for the final presentation. Share that:

- Balancing stakeholder concerns involves considering both technical feasibility and regulatory requirements.
- Effective stakeholder engagement and communication are crucial for resolving conflicts and reaching consensus.

## Conclusion

➢ **Facilitator Instructions** - With the full class, debrief a summary of the evaluation and feedback (recapping the case study's objectives and invite learners to share their initial reflections), then ask learners to share their insights below with the other participants. Once the debrief exercise is complete, offer Congratulations as drafted below.

➢ **Learner Instructions** - Take a few minutes with a few of your fellow learners to make some notes about the following reflections, and share with the class as guided by the facilitator.

- Highlight key insights and connect them to the case study's concepts, addressing any questions or clarifications needed.
- Summarize the main takeaways and discuss how they can be applied in real-world scenarios. Identify one you would like to analyze in the future.
- Summarize your experience on the exercise process.

**Congratulations!** 🎉

You've successfully navigated the complexities of this case study analysis exercise, demonstrating exceptional dedication and analytical skills. Completing this extensive set of exercises is no small feat, and your commitment to understanding and applying the concepts is truly commendable!

Through this exercise, you have showcased your ability to tackle real-world acquisition challenges and derive insightful solutions. This achievement highlights both your technical expertise and your critical analysis skills for future success as a Contracting Officer.

Keep up the great work and continue to build on this accomplishment. Well done!