

BUSINESS CASE TRAINING

ENOMAX2019

Throughout the program year, training and support will be provided to assist you in the development of your Business Case and complementary Business Pitch. There will also be informal opportunities for coaching and advice.

Eno**MAX**

Designed by transit agencies for transit agencies

ENOMAX 2019 COHORT

BUSINESS CASE TIMELINE



OVERALL GOALS

Developing a Business Case is central to the EnoMAX program. The overall goals of this focus area are for students to;

- Bring back solutions to problems at your agency or
 - Take advantage of opportunities that exist for your agency
- Deliver return on investment for your participation in MAX by implementing solutions to a business problem at your agency
- Gain experience identifying business problems and developing implementable solutions
- Expand your professional skills



Some Business Projects implemented by EnoMAX Alumni have included;

- 2013 - DART - Ambassador Program for Light Duty Employees;** replicated LA Metro's program using light duty employees to review and report equipment and infrastructure issues
- 2013 - RTD - Transit Watch App;** worked with LA Metro's IT department when developing App saving over \$100K in development costs
- 2014 - MARTA - Customer Center Remapping;** using best practices learned at LA Metro, RTD, and DART realized initial savings of over \$1M in decreased staffing requirements
- 2017 - LA Metro - Drone use in Asset Management;** developing proof of concept for technology observed at RTD



GUIDELINES FOR A SUCCESSFUL BUSINESS CASE



WHY A BUSINESS CASE

Business Case

- A document or presentation compiled to educate and convince stakeholders (such as senior executives) that a recommendation should be implemented
- Analysis of potential options, evidence of selected recommendation

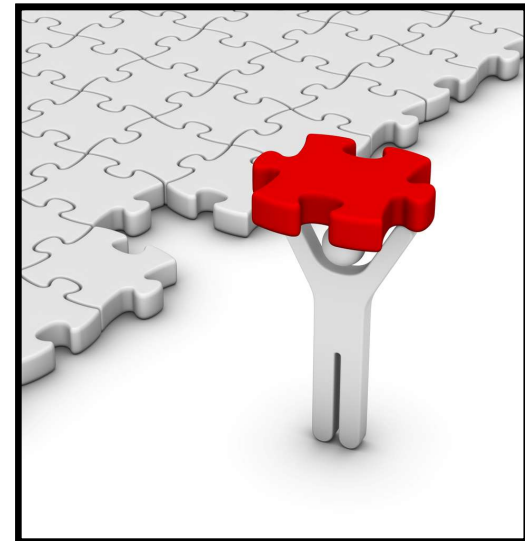
Why a Business Case?

- Logical progression of tasks
- Consistent Approach
- Clear and concise presentation of information
- Inclusion of supporting documentation
- Scalable
- Executives familiar with process

EXPECTED OUTCOMES

At the end of this process each student will have;

- A completed Business Project Worksheet
- A draft Business Case (including Executive Summary)
- A Business Pitch presentation
- Recommendation(s)/Solution(s) to respond to problem
- Expanded Skills




BUSINESS PROJECT WORKSHEET

The **Business Project Worksheet** is a planning tool for organizing your information, it provides direction with standard actions to lead to solid recommendations. It is foundational to preparing your **Business Case**.

- There are Five sections on the Worksheet
 1. Business Project Statement
 2. Current Situation Analysis
 3. Research Plan
 4. Evaluation of Alternatives (Options)
 5. Recommended Path Forward



You have both a blank Worksheet and a annotated Worksheet in your student package and electronically on the  Eno Website

Business Project Worksheet
Business Problem/Opportunity Statement
Situation Analysis
Research Plan
Evaluation of Options
Recommended Path Forward

BUSINESS PROJECT WORKSHEET

BUSINESS PROBLEM STATEMENT

1. Business Problem Statement

This is a clear statement summarizing your problem (or opportunity). It should include key issues as well as a brief description of your project

- Key information to include;
 - Exactly what is the Problem (or Opportunity)
 - Brief description of the project
 - Key issues
 - What is the desired outcome of the project

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Business Project Worksheet (Annotated)
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BUSINESS PROJECT WORKSHEET

BUSINESS PROBLEM STATEMENT

What is the Problem?

What is the Desired outcome? What are you hoping to impact?



Business Project Worksheet	(Example)
Business Problem/Opportunity Statement <i>As public transportation vehicles become more technically complex, our maintenance staff are increasingly confronted with maintenance and repair situations for which they have not been adequately trained or prepared. These situations can lead to longer vehicle downtimes, reduced capacity to transport our constituents in a timely manner, and higher fleet maintenance costs.</i>	
<i>This study will investigate how other agencies identify, deliver, and track key training requirements and certifications; how new employee skills gaps are identified and addressed; what training methods are used to keep staff competencies current with industry advancements; and what are the most effective training management systems available. The intent of this project is to create an agency plan to elevate our training programs to address our issues.</i>	
Situation Analysis	
Research Plan	
Evaluation of Options	
Recommended Path Forward	

BUSINESS PROJECT WORKSHEET

SITUATION ANALYSIS

2. Situation Analysis

This is the section of the worksheet where you analyze situation. Explain why your chosen project is a problem (or opportunity). Include in your analysis;

- Background and history
- Financial/Operational impacts
- Perception of current state
 - *Are we at a stable state, is the problem growing/declining*
- Projections if current state continues
- Work that may have already been done

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BUSINESS PROJECT WORKSHEET

SITUATION ANALYSIS

What are we including in our Current Situation Analysis?



Business Project Worksheet		(Example)
Business Problem/Opportunity Statement		
As public transportation vehicles become more technically complex, our maintenance staff are increasingly confronted with maintenance and repair situations for which they have not been adequately trained or prepared. These situations can lead to longer vehicle downtimes, reduced capacity to transport our constituents in a timely manner, and higher fleet maintenance costs.		
This study will investigate how other agencies identify, deliver, and track key training requirements and certifications; how new employee skills gaps are identified and addressed; what training methods are used to keep staff competencies current with industry advancements; and what are the most effective training management systems available. The intent of this project is to create an agency plan to elevate our training programs to address our issues.		
Situation Analysis		
Vehicle downtime in all maintenance categories; routine inspections, cyclical parts replacement and unplanned repairs have increased in the 18 months since the new (computerized) vehicles have arrived on the property. Data investigation reveals the following for each of the major cause categories, since 3/2017:		
<ul style="list-style-type: none"> • Routine inspection increased 12% in first 6 months then declined to 5% increase • Cyclical parts increased 4% in the first 6 months and continued to increase to 14% • Unplanned repairs increased 7% in the first 6 months and has increased to 10% 		
The Maintenance supervisors have investigated the problem and determined that lack of training is the cause. The routine inspection has begun to stabilize because the same personnel perform the inspections daily and have learned from one another and their own mistakes how to conduct the routine inspection. The other maintenance categories do not have consistent task or knowledge base, each instance presents new.		
Overall vehicle downtime in the last 30 day period for this equipment type is at 12%, the standard for each equipment type is 4% to allow us to provide service without overcrowding or annulling runs.		
There was maintenance personnel training for supervisors and 10 maintenance technicians at each maintenance facility. There was also videotaped training provided by the manufacturer. This is consistent with maintenance training within the department.		
Research Plan		
Evaluation of Options		
Recommended Path Forward		

BUSINESS PROJECT WORKSHEET

RESEARCH PLAN

3. Research Plan

- A successful Research Plan identifies what you will be investigating. Some thoughts;
 - What are some types of questions you may ask?
 - What are some reports you may be interested in?
 - What documents will you need to paint a picture of current situation?



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BUSINESS PROJECT WORKSHEET

RESEARCH PLAN

3. Research Plan

- At Agency Visit
 - Interview and network with resources from BPIE Sessions
 - Ask questions of relevant speakers/tour guides
 - Collect relevant printed best practices information
 - Visit relevant sites on tours or specially arranged visits
- At your host property, host week
 - Refine your project with Facilitators
- At work
 - Follow up with contacts
 - Collect documents and data
 - External research
 - Discuss projects with facilitators and supervisors

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BUSINESS PROJECT WORKSHEET

RESEARCH PLAN ACTIVITY

Developing a Research Plan

Take 10 minutes to draft your research plan.

Considerations ...

Research Plan

- Interview Targets
(Experts, Supervisors, Contractors, Operators, etc.)
- Interview Questions
- Data to collect
- Industry Best Practices
- Industry Standards
- Regulatory Requirements
- Documents to collect



*You have a Research Plan page and a blank worksheet
in your student package*

BUSINESS PROJECT WORKSHEET

EVALUATION OF OPTIONS

4. Evaluation of Options

This is the largest part of document answering most of the what, why and how questions.

- As you are conducting your research you will begin to formulate potential solutions (options) to your problem. Begin listing these solutions (options) in this section of the worksheet. List all solutions (options) including **No Action**. Do not eliminate options during this listing process, even if they seem untenable.



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BUSINESS PROJECT WORKSHEET

EVALUATION OF OPTIONS

4. Evaluation of Options

I. List Options - Identify all potential options (solutions)

II. Define and Describe Options with sufficient detail including;

- Critical assumptions
- Required resources
- Organizational capability
- Key interdependencies
 - completion of other projects, availability of key personnel, risks associated with failure of interdependencies
- Identify areas impacted
 - own department, other internal departments, external entities

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BUSINESS PROJECT WORKSHEET

EVALUATION OF OPTIONS

4. Evaluation of Options

III. Evaluate and Compare Options – Consistent evaluation (decision) criteria used for all options

- Identify Critical Assumptions, Constraints and limitations
- Identify Key Decision Criteria, some considerations
 - Cost
 - Benefits
 - Customer impacts
 - Operational Impacts
 - Technical Capability

EnoMAX *There will be a separate workshop on tools to help define and evaluate options during Visit #3*



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BUSINESS PROJECT WORKSHEET

EVALUATION OF OPTIONS

What are some criteria you would use to evaluate your options?

Are there any critical assumptions that would result in a **NO GO** decision immediately?

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Business Project Worksheet
Business Problem/Opportunity Statement
Situation Analysis
Research Plan
Evaluation of Options
Recommended Path Forward

BUSINESS PROJECT WORKSHEET

RECOMMENDED PATH FORWARD

- 5. Recommended Path Forward
 - Summarize your preferred recommendation
 - Reasoning supporting recommendation
 - Identify next steps
 - Who is responsible for project implementation
 - Major schedule milestones
 - Possible staging



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LET'S GET TO WORK

FOR THE NEXT 15 MINUTES YOU WILL WORK ON STARTING YOUR BUSINESS PROJECT WORKSHEET.



BUSINESS PROJECT WORKSHEET

ACTIVITY

Refine your Business Problem/Opportunity Statement

A model for a basic Problem Statement

Problem of _____ has the effect of _____, with the impact of _____.

What is your Problem/Opportunity?

What is the Desired outcome? What are you hoping to impact?



Business Project Worksheet
Business Problem/Opportunity Statement
Situation Analysis
Research Plan
Evaluation of Options
Recommended Path Forward

BUSINESS PROJECT WORKSHEET

SITUATION ANALYSIS ACTIVITY

Begin Situation Analysis by describing your current situation...

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Business Project Worksheet
Business Problem/Opportunity Statement
Situation Analysis
Research Plan
Evaluation of Options
Recommended Path Forward

BUSINESS PROJECT WORKSHEET

SUMMARY

- This worksheet provides a structured process for you to investigate and document your research and analysis.
- This worksheet will provide the foundation of your Business Case.



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ALUMNUS BUSINESS PITCH

NORMA ESCOBAR, 2018 CLASS



Business Case

Written or verbal presentation that is intended to educate a decision maker and convince them to take some kind of action.

BUSINESS CASE

STRUCTURE AND ELEMENTS

Producing A Business Case Document

- **Remove the Research Plan**
Do include who you talked to and where you collected data in the *Evaluation of Options* and *Recommended Path Forward* sections
- **Add Implementation Plan Section**
Include the basic timeline, resources required, and costs of implementation
- **Add Executive Summary**
Typically written after the remainder of document is finished, sometimes is the only section an Executive reads, includes essential points in the same order as the full document

Business Project Worksheet
Business Problem/Opportunity Statement
Situation Analysis
Research Plan
Evaluation of Options
Recommended Path Forward

Business Case for Project Name
Executive Summary
Business Problem/Opportunity Statement
Situation Analysis
Evaluation of Options
Recommended Path Forward
Implementation Plan

Proposed project scope influences size and detail of document

BUSINESS CASE

KEY POINTS

Business Case Description

- The document should be brief and convey only essentials
- Make it interesting, clear and concise
- Eliminate conjecture and minimize jargon
- Demonstrate the value and benefits the project brings to the business
- Describe your vision of the future
- Ensure consistent style and readability
- Do not repeat information the audience is already familiar with

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Business Case for <u>Project Name</u>
Executive Summary
Business Problem/Opportunity Statement
Situation Analysis
Evaluation of Options
Recommended Path Forward
Implementation Plan

BUSINESS PITCH

The Business Pitch is an opportunity you may get to explain your business case, its benefits, overall costs and preferred recommendations

It can take many forms, including;

1. “Elevator Pitch” – a 5-7 minute quick synopsis of your project and reasons for implementing your preferred recommendation
2. Executive Briefing – short structured meeting with Executive(s), may or may not include handouts or visual presentation
3. Visual presentation – slide presentation
4. Executive Summary – section of Business Case that is shared with Executive(s) with or without a verbal presentation

- During your 4th visit, you will be provided with Guidelines for a Business Pitch, which includes elements of 1, 2, and 4.
- You will subsequently deliver this Business Pitch at a simulated CEO meeting

PUTTING IT ALL TOGETHER

- **Research and Analysis – Business Project Worksheet**

The Business Project Worksheet provides structure and direction for your Research and Analysis

Come up with many recommendations

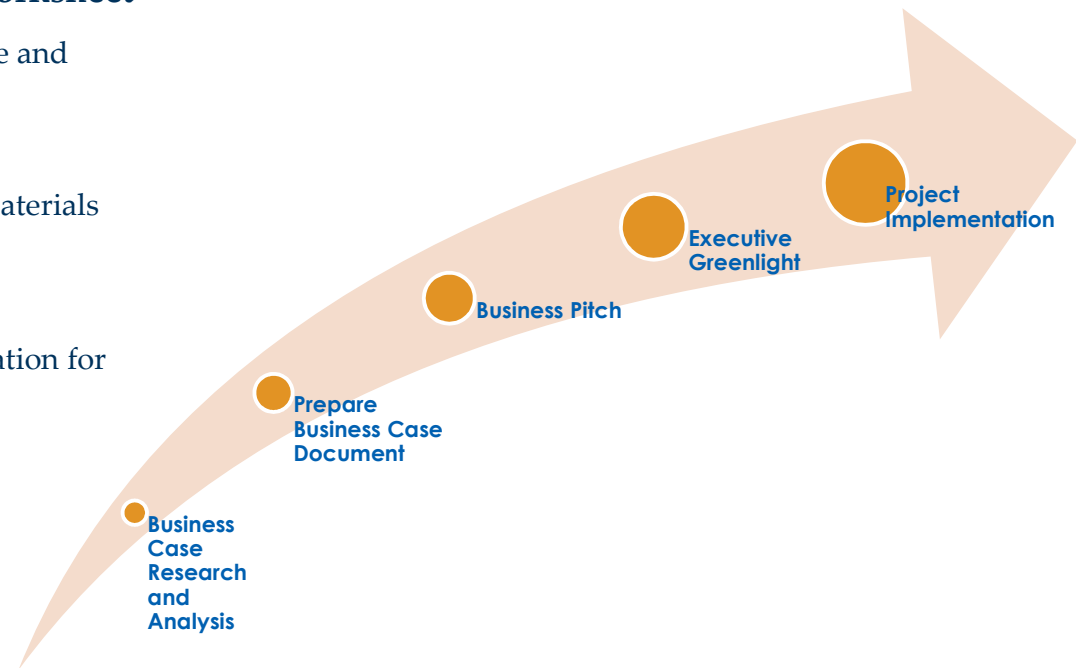
Provides the foundation for your Business Case materials

- **Prepare Business Case Document**

Uses the Business Project Worksheet as the foundation for developing your argument proving that your recommendation is viable

- **Business Pitch**

Presentation to decision makers



REAL WORLD APPLICATIONS

In your student Manual, you have an example of a completed *real world* Business Project Worksheets.