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.

EnoMAX

Designed by transit agencies for transit agencies

ENOMAX 2019 COHORT
BUSINESS CASE TIMELINE

Enrollment Stage

Student identifies **Problem or Opportunity**

Submit **Project Statement Description** via online enrollment Form

Refine Project Description online using the **Max Business Project Form**

1st Class Visit

Eno delivers a **Welcome Session** including an overview of Business Project process

Eno delivers **Guidelines to a Successful Business Case** Workshop

Host Agency schedules **Business Project Information Exchange** (**BPIE**) meeting for each visiting student

Eno Facilitator provides **Business Coaching** to Host Agency students

2nd Class Visit

BPIE #2

Business Coaching (Host Agency)

Eno Staff checks in on progress and responds to questions during a **Progress and FAQ**

Eno Staff delivers a **Public Speaking Workshop**

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BPIE #4

Business Coaching (Host Agency)

Eno Staff delivers **Business Pitch Simulation Briefing**

Eno Staff delivers **Giving Feedback Tips**

Eno staff facilitates **Business Pitch Simulation Session**

Post EnoMAX

Graduates make **Business Pitch** to Executive Team

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

EnoMAX

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

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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
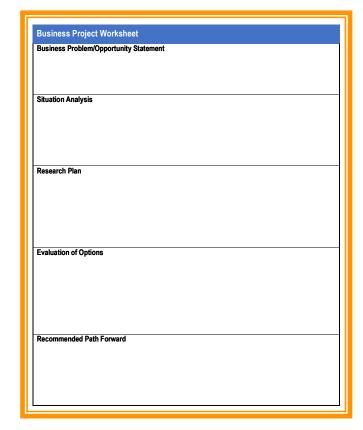
- Expanded Skills

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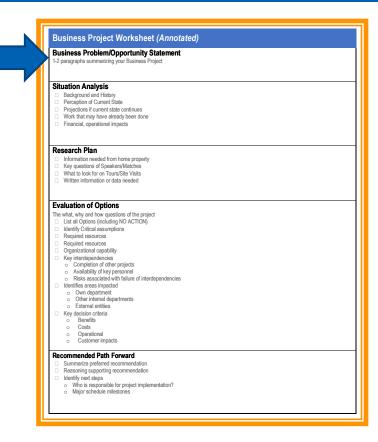
Business Project Worksheet
Business Problem/Opportunity Statement
Situation Analysis
Research Plan
Evaluation of Options
Recommended Path Forward

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
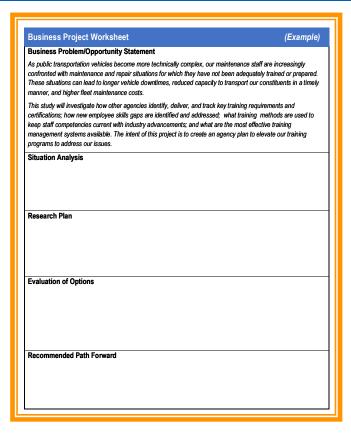 - What is the desired outcome of the project

Eno MAX

Business Project Worksheet *(Annotated)*

Business Problem/Opportunity Statement
1-2 paragraphs summarizing your Business Project

Situation Analysis
- ☐ Background and History
- ☐ Perception of Current State
- ☐ Projections if current state continues
- ☐ Work that may have already been done
- ☐ Financial, operational impacts

Research Plan
- ☐ Information needed from home property
- ☐ Key questions of Speakers/Matches
- ☐ What to look for on Tours/Site Visits
- ☐ Written information or data needed

Evaluation of Options
The what, why and how questions of the project
- ☐ List all Options (including NO ACTION)
- ☐ Identify Critical assumptions
- ☐ Required resources
- ☐ Required resources
- ☐ Organizational capability
- ☐ Key interdependencies
  - o Completion of other projects
  - o Availability of key personnel
  - o Risks associated with failure of interdependencies
- ☐ Identifies areas impacted
  - o Own department
  - o Other internal departments
  - o External entities
- ☐ Key decision criteria
  - o Benefits
  - o Costs
  - o Operational
  - o Customer impacts

Recommended Path Forward
- ☐ Summarize preferred recommendation
- ☐ Reasoning supporting recommendation
- ☐ Identify next steps
  - o Who is responsible for project implementation?
  - o Major schedule milestones

BUSINESS PROJECT WORKSHEET
BUSINESS PROBLEM STATEMENT

What is the Problem?

_____

_____

_____

_____

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

_____

_____

_____

_____

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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

Research Plan

Evaluation of Options

Recommended Path Forward

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

Eno**MAX**

Business Project Worksheet (Annotated)

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1-2 paragraphs summarizing your Business Project

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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.

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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;

- 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

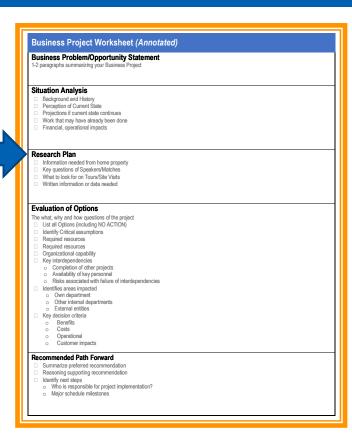**Evaluation of Options**

Recommended Path Forward

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?

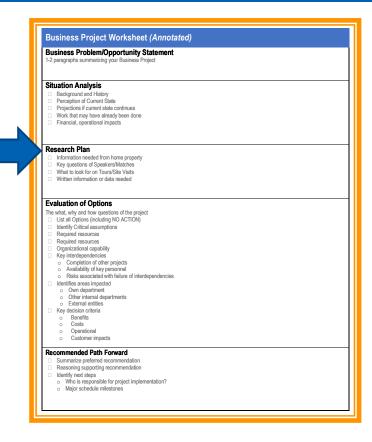 - What documents will you need to paint a picture of current situation?

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Business Project Worksheet (Annotated)

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1-2 paragraphs summarizing your Business Project

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- Information needed from home property
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- What to look for on Tours/Site Visits
- Written information or data needed

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Recommended Path Forward
- Summarize preferred recommendation
- Reasoning supporting recommendation
- Identify next steps
  - Who is responsible for project implementation?
  - Major schedule milestones

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 *(Annotated)*

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1-2 paragraphs summarizing your Business Project

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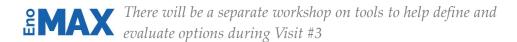 - Own department
  - Other internal departments
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  - Who is responsible for project implementation?
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BUSINESS PROJECT WORKSHEET
RESEARCH PLAN ACTIVITY

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

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

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 *(Annotated)*

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1-2 paragraphs summarizing your Business Project

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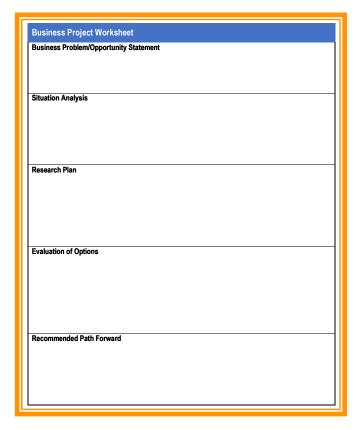 - Who is responsible for project implementation?
  - Major schedule milestones

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4. Evaluation of Options

I. List Options - Identify <u>all</u> 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

Business Project Worksheet *(Annotated)*

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1-2 paragraphs summarizing your Business Project

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Recommended Path Forward
- Summarize preferred recommendation
- Reasoning supporting recommendation
- Identify next steps
  - Who is responsible for project implementation?
  - Major schedule milestones

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

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

Business Project Worksheet *(Annotated)*

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1-2 paragraphs summarizing your Business Project

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Recommended Path Forward
- Summarize preferred recommendation
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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

- **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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Business Project Worksheet *(Annotated)*

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1-2 paragraphs summarizing your Business Project

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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?

_____

_____

_____

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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

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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.

Business Project Worksheet *(Annotated)*

Business Problem/Opportunity Statement
1-2 paragraphs summarizing your Business Project

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ALUMNI BUSINESS PITCH

ALUMNI BUSINESS PITCH

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Business Case

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

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BUSINESS CASE
STRUCTURE AND ELEMENTS

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

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 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 Project Name
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 <u>may</u> 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

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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

Project Implementation

Executive Greenlight

Business Pitch

Prepare Business Case Document

Business Case Research and Analysis

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REAL WORLD APPLICATIONS

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

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PROGRESS AND FREQUENTLY ASKED QUESTIONS

AGENCY VISIT #2

Let's recap where we are…
Take this opportunity to answer questions, discuss any obstacles, check-in on progress to date

GUIDELINES FOR A SUCCESSFUL BUSINESS CASE
BUSINESS CASE TIMELINE

Enrollment Stage

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EnoMAX

PROGRESS AND FREQUENTLY ASKED QUESTIONS

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BPIE #4

Business Coaching (Host Agency)

Eno Staff delivers **Business Pitch Simulation Briefing**

Eno Staff delivers **Giving Feedback Tips**

Eno staff facilitates **Business Pitch Simulation Session**

Post EnoMAX

Graduates make **Business Pitch** to Executive Team

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DEFINING AND EVALUATING OPTIONS

EVALUATION OF OPTIONS

Evaluation of Options

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

1. List <u>all</u> Options

2. Define/Describe each option

3. Evaluate/Compare Options

4. Rank Options and Make Final Recommendation

   - Summarize analysis

   - Explain reasons (evidence) for choice

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EVALUATION OF OPTIONS

Define/Describe each Option

When defining your options, be clear and complete. You may include the following in your descriptions;

- 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

DEFINING AND EVALUATING OPTIONS
EVALUATE/COMPARE OPTIONS

Evaluate/Compare Options

- Identify Critical Assumptions

- Identify Decision Criteria you will use to evaluate and compare options. Decision Criteria can include measures that are both;
  - Qualitative
  - Quantitative

Other Considerations
- Risk(s)
  - Of implementation
  - Of no action
- Constraints/Limitations

Examples of Critical Assumptions

- Personnel have skills and abilities to learn new technology

- Equipment is available for hands on training and practice

- Customers are willing to use new service?

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DEFINING AND EVALUATING OPTIONS
DECISION CRITERIA

Developing Decision Criteria

Each Business Case requires decision criteria specific to the problem being solved. Some criteria you may consider are Financial, Operational, Customer Impact, and Benefits.
Here are examples from each category;

- **Financial Analysis**
    - Costs/benefits for each option including no-action
    - Consider every associated cost
    - Ensure affordability
    - Project ROI
    - Identify predicted budget and cash flow implications
    - Degree of confide

- **Operational Analysis**
    - Industry/Regulatory Standards
    - Consistency with existing infrastructure/equipment
    - Personnel

- **Customer Impact Analysis**
    - Ease of use
    - Familiarity
    - Cost to use
    - Impact to current system

- **Benefits**
    - External Public Relations
    - Long Term

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DEFINING AND EVALUATING OPTIONS

Evaluating Options

Choose relevant decision criteria and evaluate each option against the criteria. Then compare and rank the options leading to a recommended path forward. Don't forget to consider the following;

- Risk
  - Assessing Risk
  - Mitigating Risk
- Critical assumptions
  - No Go Criteria
- Constraints/Limitations

Decision Criteria	Option 1	Option 2	Option 3

DEFINING AND EVALUATING OPTIONS

Tools for Evaluating Options

- Many standard tools for evaluating options

- Your agency has preferred tools for evaluating options

- Select process **consistent with magnitude of project**

- Select process you are comfortable using and explaining

DEFINING AND EVALUATING OPTIONS
FINAL RECOMMENDATION

Recommended Path Forward

The final step in the evaluation process is ranking the options and selecting a recommended path forward. The highest ranked option is not always the recommended option. Consider Critical Assumptions, Risk, Constraints and Limitations when making your final decision.

- Summarize your preferred recommendation

- Reasoning supporting the recommendation

- Identify next steps

    - Who is responsible for project implementation

    - Major schedule milestones

    - Possible staging

PROGRESS AND FREQUENTLY ASKED QUESTIONS

AGENCY VISIT #4

Let's recap where we are…
Take this opportunity to answer questions, discuss any obstacles, check-in on progress to date

GUIDELINES FOR A SUCCESSFUL BUSINESS CASE
BUSINESS CASE TIMELINE

Enrollment Stage

Student identifies **Problem or Opportunity**

Submit **Project Statement Description** via online enrollment Form

Refine Project Description online using the **Max Business Project Form**

1st Class Visit

Eno delivers a **Welcome Session** including an overview of Business Project process

Eno delivers **Guidelines to a Successful Business Project** Workshop

Host Agency schedules **Business Project Information Exchange** (**BPIE**) for each visiting student

Eno Facilitator provides **Business Project Coaching** to Host Agency students

2nd Class Visit

BPIE #2

Business Project Coaching (Host Agency)

Eno Staff checks in on progress and responds to questions during a **Business Project FAQ**

Eno Staff delivers a **Public Speaking Workshop**

3rd Class Visit

BPIE #3

Business Project Coaching (Host Agency)

Eno Staff checks in on progress and responds to questions during a **Business Project FAQ**

Eno staff delivers **Defining and Evaluating Options Workshop**

4th Class Visit

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BUSINESS PITCH SIMULATION GUIDELINES

BUSINESS PITCH

What to include in a Business Pitch

- Share the key points of the business case

- Summarize all options considered

- Summarize decision criteria used to select final recommendation

- Present the final recommendation

  - Summarize analysis

  - Identify potential risk and how to minimize

Delivering a Successful Business Pitch

- Prepare for your presentation

- Practice your presentation

- Make notes

  - Bullet Points

- Anticipate Questions

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BUSINESS CASE PITCH
ENOMAX SIMULATION

Delivering the Pitch

This simulation is an opportunity to practice the Business Pitch prior to delivering it to you Agency CEO and/or Executive Team.

- Each student will deliver a 5 minute oral presentation of their business project.

- Deliver your pitch as though the mock CEO is your agency's CEO. Assume those participating in the exercise have local knowledge of your system and function within the organization.

Receiving Feedback

- After you are done speaking, the CEO will ask questions about the pitch "in character."

- The other students are invited to offer constructive feedback about the project or the presenter's delivery. The CEO may also offer feedback "out of character."

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GIVING FEEDBACK

GIVING AND RECEIVING FEEDBACK

Giving Feedback

(Most of) the feedback offered during the MAX program will be peer based and real-time. Here are three types of short feedback for use during the MAX program.

1. **Appreciative**

- Is a positive reinforcement that encourages repetition of effective behavior.
  - Describes the specific behavior.
  - Explains why the behavior is valued.

2. **Constructive**

- Is a reinforcement that attempts to discourage repetition of a behavior by providing a more effective and productive alternative behavior.
  - Explains a behavior that is more effective.
  - Explains why the proposed behavior is valued.

3. **Balanced**

- Feedback that offers both strengths and opportunities to the recipient in one short statement.
  - Describes one strength and one opportunity.
  - Both should be offered by the feedback presenter as the most impactful points observed.
  - Should use one of the following formats or equivalent
    - "What I thought you did well was…"
    - "What I thought you could improve was…"
    - "What was effective was…"
    - "What I thought would make it even more effective was…"

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GIVING AND RECEIVING FEEDBACK

Receiving Feedback

The people offering you feedback during MAX care about your success. Therefore, feedback should be viewed as a gift. Here are points to consider, especially when you receive feedback in group environments:

- Ask short questions for clarity if needed

- Do not argue with the feedback offered or offer explanations as rebuttal

- A simple thank you is appreciated and all that is necessary