Case Study Analysis Checklist

# Instructions:

1. Save and use this checklist for EACH case study. You may use this document or a second document to record your answers.
2. Keep in mind that you may identify issues or improvements that, at this time, may not add value to the organization or an implementation may not be feasible for other reasons. The point of this exercise is to analyze all of your observations to determine if there is an added business value to making a change. For example, there may be a new technology, application or tool that is awesome and would be very cool to implement or upgrade but the added value to the business may not be outweighed by the cost. You also must think deeply about hidden costs or unexpected consequences.

Case Name: \_\_It Disconnect at Cascade Sustainable Energy \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_9/1/23\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## **Preparation**

[x] Read the case study in its entirety.

[x] Timeline: What happens when and why?

Orientation takes place in summer due to hiring college grads.

Work on orientation system could take place in fall / winter but cannot extend to spring.

Year or more for a new system

[x] Identify: Highlight relevant facts

IT Dan thinks that in-house solutions are better than vendor.

Maggie has asked for new features to improve the orientation system.

Looked at how to implement orientation system in 4 different systems already used by company (CRM, ERP, Conference scheduling, general room and resource scheduling system)

Next release of ERP fits the most requirements and is best fit according to Don and Ryan

[ ] Focus: Detect 3-5 key problems

### **Detail: For each key problem**

 **The orientation process is not streamlined and a bit confusing.**

[x] Why does the problem exist?

There are no checks in place to ensure that people are going to the correct sections for their orientation.

[x] What is the cause?

The orientation system has not been updated or upgraded.

[x] How did it happen?

The IT department has not responded to the request of HR to improve the orientation process.

[x] What is the consequence?

The HR department and the new hires must go through a convoluted process for new hires that results in a bad orientation experience.

[x] How did it impact the IT group?

The IT group has let down the HR department and possibly strained the relationship between the 2 departments.

[x] How did it impact the organization?

New hires have a bad experience in their orientation process and the company sometimes pays for things that are not used such as empty hotel rooms.

[x] Who is responsible?

The IT group.

### **Find: Possible solutions**

[x] What could have been differently?

The IT group could have listened to the HR department’s requests and followed through on their end.

[x] What needs to change? The processes? The people? The technology?

The processes need to be changed to improve the orientation process for HR and new hires.

[x] Do some research.

IT has neglected its responsibility to improve the organization’s processes.

### **Solve: Propose a solution**

 **Improve the orientation process.**

[x] List the pros and cons

|  |  |
| --- | --- |
| **Pros** | **Cons** |
| The new hires get a better experience | It will take a lot of time  |
| It will save the company future resources | It will take a lot of resources |
| The updates will improve new hires feelings towards the company  | IT has to undertake a large project  |

[x] How does it compare to other solutions?

The other solution is to do nothing and let the company continue to provide bad experiences to new hires and HR.

[x] Is the solution feasible?

Yes

[ ] Provide evidence (cite your sources)

### **Detail: For each key problem**

 **The IT group does not think that an outside solution (vendors) would be more effective than an in-house solution.**

[x] Why does the problem exist?

The IT group is overconfident in themselves.

[x] What is the cause?

The IT group has overconfidence in themselves.

[x] How did it happen?

Hubris.

[x] What is the consequence?

The full range of options are not being explored.

[x] How did it impact the IT group?

They let down the rest of organization by assuming they could handle the task.

[x] How did it impact the organization?

They did not get the possible solution they were seeking.

[x] Who is responsible?

The IT group.

### **Find: Possible solutions**

[x] What could have been differently?

The IT group could have explored the possibility that the outside solutions could be a real solution.

[x] What needs to change? The processes? The people? The technology?

The people of the IT group and the process of the RFP.

[x] Do some research

The IT group needs to review the vendor options and submit the RFPs.

### **Solve: Propose a solution**

 **Develop RFPs for the vendors and review the results.**

[x] List the pros and cons

|  |  |
| --- | --- |
| **Pros** | **Cons** |
| The vendors feasibility can be assessed. | They may come back looking better than the IT groups.  |
| The best solution can be selected by the organization. | The IT group has to create and submit RFPs |

[x] How does it compare to other solutions?

It creates work for the IT group that may not be something they are interested in doing.

[x] Is the solution feasible?

Yes, it will allow the best solution to be selected by the organization.

[ ] Provide evidence (cite your sources)

### **Detail: For each key problem**

 **There is no documentation on the orientation and onboarding system for the organization.**

[x] Why does the problem exist?

There is no written documentation on the system.

[x] What is the cause?

No one has taken the time to document the system.

[x] How did it happen?

When the system was created no one took the time to create documentation on the system.

[x] What is the consequence?

Every time a new person is assigned to the project to update the system, they must be taught it by someone.

[x] How did it impact the IT group?

Each time a new person gets assigned to the project they must be taught it by someone that knows it. Taking time and resources away from other important tasks.

[x] How did it impact the organization?

Maggie in HR must take time to train someone each time they are assigned to the project.

[x] Who is responsible?

The IT group.

### **Find: Possible solutions**

[x] What could have been differently?

Documentation could be created for the orientation system.

[x] What needs to change? The processes? The people? The technology?

The process needs to change.

[ ] Do some research

### **Solve: Propose a solution**

 **Create documentation for the orientation system.**

[ ] List the pros and cons

|  |  |
| --- | --- |
| **Pros** | **Cons** |
| There will be documentation for the system | Someone must take the time to create it |

[x] How does it compare to other solutions?

It creates a framework for the rest of the organization to follow.

[x] Is the solution feasible?

Yes

[ ] Provide evidence (cite your sources)

Any good organization has documentation on their systems for employees to review to create a better understanding of how and why things function as they do.