Case-Study Exercise: Module Seven

Case-Study Exercise: Overview

Purpose

This exercise will test the following knowledge and abilities:

Basic research skills: Your ability to review existing customer related information to determine what is important and how it fits together

Adoption awareness: Your general understanding of the need for successful product/service adoption and the basic processes involved in researching, planning for and implementing adoption services for a new customer.

Adoption research: Your ability to perform sufficient and appropriate research and documentation to ensure that information required for adoption planning is uncovered and recorded.

User Adoption requirements: Your ability to understand the different adoption needs (knowledge skills and attitude) of a wide range of users

Adoption planning: Your ability to determine an adoption plan for a new customer engagement, based upon an analysis of the information uncovered and documented during the research process and including user communication, training and support

Instructions

First read the 'Task', making sure you absorb and understand it fully. Then turn to the 'Scenario' to read the background information that relates to the task, again making sure you absorb and understand it fully. Once you are sure you have fully understand both task and scenario, complete the task using the information provided within the scenario to help you.

The task should take you a minimum of 45 minutes to complete. Some students may find they need longer in order to complete the task thoroughly.

Once you have completed the task, turn to the 'Model Answer' and compare your own response with that within the model answer. Note that the model answer is simply one possible response to the task, and does not provide either a 'best' or a 'definitive' response to the task, since there may be multiple ways in which information contained in the scenario and tasks might be interpreted, and multiple ways in which problems might be approached and/or challenges might be overcome, that would all yield an equally positive result.

Case-Study Exercise: Challenge

Task

This exercise uses the "Model Answer" from Case Study Exercise Six for the case study data.

Review and analyze the adoption research information provided within the Capabilities and Processes tool, the Impacted Groups tool, the Adoption Activities tool and the Practical Considerations tool.

Apply the WBS (work breakdown structure) methodology to develop a high level plan for the implementation of all the necessary adoption activities to maximize the likelihood of success for this initiative. This should include Major Works Streams and Sub Work Streams only.

Then apply the WBS (work breakdown structure) methodology to create a detailed plan to include all the individual work packages for those activities relating to user adoption at the customer's Head Office (only). For each activity within your detailed plan you must show the following information:

- Name (a unique name for each activity that can be used when referring to it)
- Description (a very brief explanation of what the activity is and how it works)
- Target IGs (which impacted groups will be involved with the activity)
- Personnel (who will be involved in delivering or performing the activity)
- Timings (how long the activity will take)
- Results (what the outcome/s of the activity will be)
- Measurement (how performance of the activity will be measured)
- Dependencies (which other activities must take place first)

Your plan must meet the customer's adoption requirements to ensure they are fully prepared and ready to utilize their new solution and to generate value from it. Your plan should also bear in mind the need to be as cost effective as possible (though you do not need to calculate expenditure within the exercise) and must be realistic in terms of types of activities selected.

Finally use the Critical Path Method (CPM) to calculate the overall duration of and show the critical path through the implementation project. Make sure you allow for both the time taken for each work package (suggest allow a minimum of a day) and any time that might need to elapse *between* each work package (for example in order to provide a selection of dates for training that are not side-by-side in the diary).

Remember that if you do not know something, you can always make an assumption and then validate it later when you have the opportunity.

Scenario

(See over page…)

Capabilities and Processes

No.	Name	Description	Owner	Department/Function	Explanation of Impact	Impacted Users
Capability / Process 1	Help Customers to search for a hotel room	The ability to assist customers to find a hotel room that meets their requirements in terms of location, facilities, cost and arrival and departure dates	Reservations	Reservations at HQ and Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, possibly all hotel managers as well?
Capability / Process 2	Help Customers to reserve a hotel room	The ability to assist customers to reserve and pay (in total or a deposit) for a hotel room that meets their requirements in terms of location, facilities, cost and arrival and departure dates	Reservations	Reservations at HQ and Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, possibly all hotel managers as well?
Capability / Process 3	Look up an existing reservation	The ability to look up an existing hotel room reservation	Reservations	Reservations at HQ and Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, possibly all hotel managers as well?
Capability / Process 4	Amend an existing reservation	The ability to amend an existing hotel room reservation – for example arrival and/or departures dates and payments	Reservations	Reservations at HQ and Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, possibly all hotel managers as well?
Capability / Process 5	Cancel an existing reservation	The ability to cancel an existing hotel room reservation and (if relevant) refund all or part of payment made	Reservations	Reservations at HQ and Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, possibly all hotel managers as well?
Capability / Process 6	Check in on arrival and allocate room	The ability to check in an arriving customer, allocate them a room and if necessary take a deposit	Reception	Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, all Hotel Managers
Capability / Process 7	Check out on departure and take payment	The ability to check out a customer and settle the invoice	Reception	Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, all Hotel Managers
Capability / Process 8	View room utilization (hotel)	The ability to view and report on room utilization at any selected hotel or within the chain in total	HQ Manager	Reservations at HQ and Reception at each Hotel	A new process based upon using the new RoomStacker tool	All Reservations staff, all Reception staff, all Hotel Managers
Capability / Process 9	Create and view management reports (hotel)	The ability to create and view management reports for the manager's own hotel	Hotel Manager	Managers at each hotel	A new process based upon using the new RoomStacker tool	Hotel managers only
Capability / Process 10	Create and view management reports (chain)	The ability to create and view management reports for any selected hotel or on the chain as a whole	HQ Manager	Managers at each hotel	A new process based upon using the new RoomStacker tool	Head Office Managers only
Capability / Process 10	Training and Support	The Reservations team will provide ongoing training and support to all users	Reservations	Reservations at HQ	N/A	Reservations team need to know all functions in order to be able to support and train them

Impacted Groups

IG	Name	Description	Changes	Knowledge	Skills	Attitude
Group 1	Head Office Reservations	Reservations Team at Head Office. Six team members. Good IT skills. Good language skills. Perform training and support duties as well as their own tasks	Full use of new RoomStacker reservations system	Basic concepts how the system works, plus specific tasks on the system described under "skills"	Search for an existing reservation Cancel an existing reservation Amend an existing reservation Provide refunds Search for available rooms Make a new reservation Take a deposit Create management reports	Probably good, as they expect the new system to help reduce their workload
Group 2	Head Office Management	Senior and Middle Management at Head Office. Ten in total. Good English language skills.	Use of the new system for management reporting and decision making only	Basic concepts of how the system works, plus specific tasks on the system described under "skills"	Management reporting	Limited time available. Need to lay on multiple sessions for them to select from and communicate that this is a priority to ensure they turn up to the training session
Group 3	Head Office IT	IT team of eight people at Head Office. Management and maintenance of the datacenter and software systems	Technical awareness of how to manage, maintain and support the RoomStacker reservations system	Full details on how the system works, and how it is installed, configured, managed and maintained	Ongoing management, maintenance and security	Fully on board, ready to go
Group 4	Hotels Reception Teams	Reception Teams at each hotel. 27 hotels each with five to twelve people in the team.	Full use of new RoomStacker reservations system for all reception related tasks	Basic concepts how the system works, plus specific tasks on the system described under "skills"	Search for an existing reservation Check in process Allocate room Re-allocate room Check out process Amend an existing reservation	Unknown, need to find out - might vary between locations
Group 5	Hotels Management Teams	Management Teams at each hotel. 27 hotels each with minimum of four managers (one "manager" plus three "deputies") in the team.	Full use of new RoomStacker reservations system for all reception related tasks and for management reporting	Basic concepts how the system works, plus specific tasks on the system described under "skills"	Search for an existing reservation Check in process Allocate room Re-allocate room Check out process Amend an existing reservation Create management reports	Unknown, need to find out - might vary between locations

Adoption Activities:

IG	Name	Description	Changes	Communication	Training	Support	Other
Group 1	Head Office Reservations	Reservations Team at Head Office. Six team members. Good IT skills. Good language skills. Perform training and support duties as well as their own tasks	Full use of new RoomStacker reservations system	Immediate announcement from CEO and Finance Director, followed by a schedule of training dates and times from Anita Aydin. Training to be attended by the CSM (to get to know the Reservations Team). Post training follow up by phone and email.	Face to face classroom course to include: Search for an existing reservation Cancel an existing reservation Amend an existing reservation Provide refunds Search for available rooms Make a new reservation Take a deposit Create management reports	Need to explore requirement for an end user support package	Priority 2. Half day course, two events (to enable continuity of reservations service during training)
Group 2	Head Office Management	Senior and Middle Management at Head Office. Ten in total. Good English language skills.	Use of the new system for management reporting and decision making only	Immediate announcement from CEO and Finance Director, followed by a schedule of training dates and times from Anita Aydin. Training to be attended by the CSM (to get to know the Management Team). Post training follow up by phone and email.	Face to face classroom course to include: Management reporting	Will be supported by the Reservations Team	Priority 2 One to Two hour course, three events (managers can select which one to attend), two of which can follow directly after Reservations team training events to save travel
Group 3	Head Office IT	IT team of eight people at Head Office. Management and maintenance of the datacenter and software systems	Technical awareness of how to manage, maintain and support the RoomStacker reservations system	Immediate announcement from CEO and Finance Director, followed by a schedule of training dates and times from Anita Aydin. Training to be attended by the CSM (to get to know the IT Team). Post training follow up by phone and email.	Face to face classroom course to include: Ongoing management, maintenance and security	Direct support from our own support team	Priority 1 - need to start ASAP. Two x 1 day courses (to enable continuity of IT services during training)
Group 4	Hotels Reception Teams	Reception Teams at each hotel. 27 hotels each with five to twelve people in the team.	Full use of new RoomStacker reservations system for all reception related tasks	Immediate announcement from CEO and Finance Director, followed by a schedule of training dates and times from Anita Aydin. Post training follow up by phone and email.	Online instructor-led training to include: Search for an existing reservation Check in process Allocate room Re-allocate room Check out process Amend an existing reservation	Will be supported by the Reservations Team	Priority 3 - roll out to each of the three "Regions" in turn. Two events per region (to enable continuity of services at each hotel). Combined training for Reception and Managers with additional management training on reports provided at the end
Group 5	Hotels Management Teams	Management Teams at each hotel. 27 hotels each with minimum of four managers (one "manager plus three "deputies") in the team.	Full use of new RoomStacker reservations system for all reception related tasks and for management reporting	Immediate announcement from CEO and Finance Director, followed by a schedule of training dates and times from Anita Aydin. Post training follow up by phone and email.	Online instructor-led training to include: Search for an existing reservation Check in process Allocate room Re-allocate room Check out process Amend an existing reservation Create management reports	Will be supported by the Reservations Team	Priority 3 - roll out to each of the three "Regions" in turn. Two events per region (to enable continuity of services at each hotel). Combined training for Reception and Managers with additional management training on reports provided at the end

Practical Considerations:

Consideration	Documentation	Ownership
Implementation Phases	Priority 1 = IT Team Priority 2 = Head Office (Reservation and HQ Management) Priority 3 = Hotels (Reception and Hotel Management)	CSM and SPL
User Availability	For continuity of service, provide the following: 2 x 1 day courses for IT team 2 x 1/2 day courses for Reservations team 3 x 1-2 hour courses for HQ Management 2 x half day courses for each region for all hotel staff (six half day courses in total)	CSM and SPL
External Dependencies	Check on installation and configuration of customer's new system, but proceed with training on our own demo system	CSM
Internal Dependencies	Ensure senior management (ie CEO and Head of Finance) make it a priority to communicate the importance of attendance and participation	SPL
Financing	Agreed and in place. Check on end user support for Reservations team	CSM
Deadlines and Timeframes	Must go live in four weeks	CSM and SPL
Milestones and KPIs	1. Sign off on training and competence for IT team 2. Sign off on training and competence for Reservations team 3. Sign off on training and competence for HQ Management team 4. Sign off on training and competence for Region 1 Hotel Reception and Management teams 5. Sign off on training and competence for Region 2 Hotel Reception and Management teams 6. Sign off on training and competence for Region 3 Hotel Reception and Management teams	CSM and SPL
Internal and External Standards	N/A - need to validate?	

MODEL ANSWER

Warning: Do not review until after you have completed the exercise

Case-Study Exercise: Model Answer

Note: For this exercise, multiple assumptions may have been made during the development of your answer, as they were during the development of the model answer shown below. As such, your answer may be somewhat or even very different from the model answer in its detail. That is fine, it is not necessary for your answer to match the model answer in its detail, so long as you can justify the specifics of your answer, and so long as your answer is as logical and orderly, and similarly comprehensive to that of the model answer.

Part One: Major Work Streams and Sub Work Streams

Project Title	0	"RoomStacker" for Kocak Holiday Group	Project
Major Work Streams	1	Head Office	
	2	Kocak Owned Hotels	Major Work Streams
	3	Kocak Managed Hotels	
Sub Work Streams	1.1	HO Reservations Team	
	1.2	HO Management Team	
	1.3	HO IT Team	
	2.1	Hotel Receptionists	Sub Work Streams
	2.2	Hotel Managers	
	3.1	Hotel Receptionists	
	3.2	Hotel Managers	

Part Two: Work Packages for Head Office Users

See overleaf…

Ref	Name	Description	Target IGs	Personnel	Timings	Results	Measurement	Dependencies
1.1.1	Initial Communication to HO Reservations Team	A 30 to 45 minute online briefing with all six members of the reservation team, with a senior manager from Kocak also present. The meeting will explain what is happening in order to gain buy-in from team members and prepare them for the upcoming change in their work flow.	Group 1	CSM, Anita Aydin (SPL), Eymen Yildirim (CEO)	One hour	The Reservations team will be aware of the upcoming changes and be prepared and motivated to attend the training	Verbal confirmation of satisfactory completion from SPL and CEO	None
1.1.2	Training Communication to HO Reservations Team	Email invitation to the training sent to each member of the Reservations team, to include all necessary instructions, such as date, time, location, etc. and request to confirm attendance.	Group 1	CSM, Anita Aydin (SPL)	15 minutes	Each team member will know when and how to attend their training session	Email confirmation from each team member	1.1.1
1.1.3	HO Reservations Team Training Session 1	The first of two half day training sessions for the Reservations team. The training will provide an overview of RoomStacker and will then provide detailed training on how to perform each process the Reservations team will be expected to either perform themselve sor support their colleagues on. Time at the end will be provided to answer any questions. The team leader Hiranur Aksoy will be present at this session.	First 3 users from Group 1	Instructor, CSM, Hiranur Aksoy (Team Leader), Anita Aydin (SPL)	Four hours	The first three team members will be fully trained and ready for participation	Verbal confirmation of satisfactory completion from each team member. Written confirmation from SPL and team leader	1.1.2
1.1.4	HO Reservations Team Training Session 2	The second of two half day training sessions for the Reservations team. The training will provide an overview of RoomStacker and will then provide detailed training on how to perform each process the Reservations team will be expected to either perform themselve sor support their colleagues on. Time at the end will be provided to answer any questions. The team leader Hiranur Aksoy will again be present at this session.	Remaining users from Group 1	Instructor, CSM, Hiranur Aksoy (Team Leader), Anita Aydin (SPL)	Four hours	The remaining three team members will be fully trained and ready for participation	Verbal confirmation of satisfactory completion from each team member. Written confirmation from SPL and team leader	1.1.2
1.2.1	Initial Communication to HO Management Team	A 30 to 45 minute online briefing with all ten members of the senior and middle management teams, led jointly by Eymen Yidrim (CEO) and the CSM. The meeting will explain what is happening in order to gain buy-in from team members and prepare them for the upcoming change in their work flow and in the overall strategic benefits for the company as a whole	Group 2	CSM, Anita Aydin (SPL), Eymen Yildirim (CEO)	One hour	The Management team will be aware of the upcoming changes and be prepared and motivated to attend the training	Verbal confirmation of satisfactory completion from SPL and CEO	None
1.2.2	Training Communication to HO Management Team	Email invitation to the training sent to each member of the Management team, to include all necessary instructions, such as date, time, location, etc. and request to select their preferred event and confirm attendance	Group 2	CSM, Anita Aydin (SPL)	15 minutes	Each team member will know when and how to attend their training session	Email confirmation from each team member	1.2.1
1.2.3	HO Management Team Training Session 1	The first of three, 1 to 2 hour training sessions for the Management team. The training will provide an overview of RoomStacker and will then explain the benefits to the company and overview the different roles of each impacted user group. Time at the end will be provided to answer any questions. Either the CEO or Head of Finance will be present at each session to ensure motivation and buy-in and to answer non-product related questions	Members of Group 2 that selected this session	Instructor, CSM, Anita Aydin (SPL) and either the CEO or Head of Finance	Two hours	Each attendee will have received the necessary training and will understand the impact to their staff	Verbal confirmation of satisfactory completion from SPL and CEO	2.2.2
1.2.4	HO Management Team Training Session 2	The second of three, 1 to 2 hour training sessions for the Management team. The training will provide an overview of RoomStacker and will then explain the benefits to the company and overview the different roles of each impacted user group. Time at the end will be provided to answer any questions. Either the CEO or Head of Finance will be present at each session to ensure motivation and buy-in and to answer non-product related questions	Members of Group 2 that selected this session	Instructor, CSM, Anita Aydin (SPL) and either the CEO or Head of Finance	Two hours	Each attendee will have received the necessary training and will understand the impact to their staff	Verbal confirmation of satisfactory completion from SPL and CEO	1.2.3
1.2.5	HO Management Team Training Session 3	The Third of three, 1 to 2 hour training sessions for the Management team. The training will provide an overview of RoomStacker and will then explain the benefits to the company and overview the different roles of each impacted user group. Time at the end will be provided to answer any questions. Either the CEO or Head of Finance will be present at each session to ensure motivation and buy-in and to answer non-product related questions	Members of Group 2 that selected this session	Instructor, CSM, Anita Aydin (SPL) and either the CEO or Head of Finance	Two hours	Each attendee will have received the necessary training and will understand the impact to their staff	Verbal confirmation of satisfactory completion from SPL and CEO	1.2.3
1.3.1	Initial Communication to HO IT Team	A 30 to 45 minute online briefing with all eight members of the IT team, led jointly by Anita Aydin (SPL) and the CSM. The meeting will explain what is happening in order to gain buy-in from team members and prepare them for the upcoming change in their work flow.	Group 3	CSM and Anita Aydin (SPL)	One hour	The IT team will be aware of the upcoming changes and be prepared and motivated to attend the training	Verbal confirmation of satisfactory completion from SPL	None
1.3.2	Training Communication to HO IT Team	Email invitation to the training sent to each member of the IT team, to include all necessary instructions, such as date, time, location, etc. and request to select their preferred event and confirm attendance	Group 3	CSM, Anita Aydin (SPL)	15 minutes	Each team member will know when and how to attend their training session	Email confirmation from each team member	1.3.1
1.3.3	HO IT Team Training Session 1	The first of two 1 day training sessions for the IT team. The training will provide detailed training on how to manage and support RoomStacker. Time at the end will be provided to answer any questions. The team leader and deputy leader will each attend one of the sessions.	First 4 users from Group 3	Instructor, CSM, and Anita Aydin (SPL)	One day	Each attendee will have received the necessary training to fulfil their role	Verbal confirmation of satisfactory completion from SPL and either the team leader or deputy leader	1.3.2
1.3.4	HO IT Team Training Session 2	The Second of two 1 day training sessions for the IT team. The training will provide detailed training on how to manage and support RoomStacker. Time at the end will be provided to answer any questions. The team leader and deputy leader will each attend one of the sessions.	Remaining 4 users from Group 3	Instructor, CSM, and Anita Aydin (SPL)	One day	Each attendee will have received the necessary training to fulfil their role	Verbal confirmation of satisfactory completion from SPL and either the team leader or deputy leader	1.3.2

Part Three: Overall Duration for Project and Critical Path
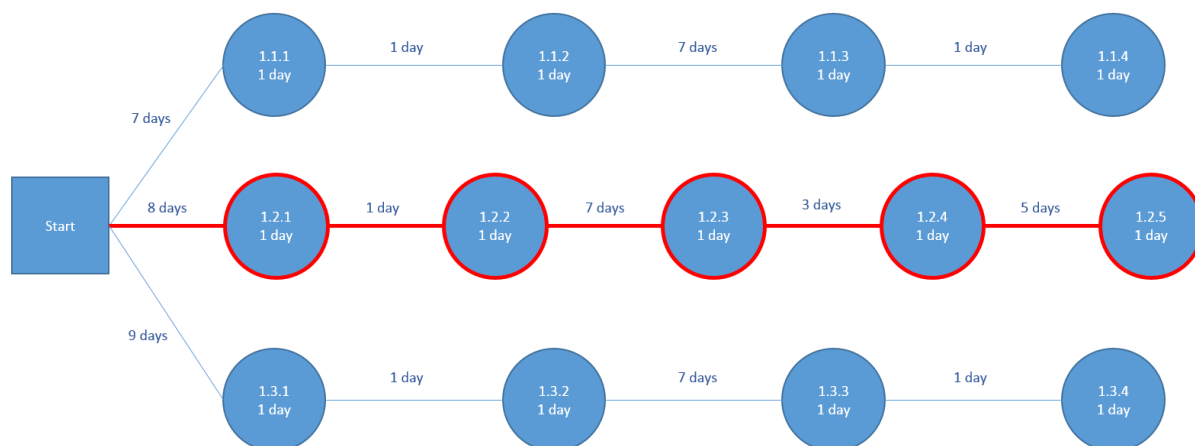
Case-Study Exercise: Your Score

Scoring

Once you have finished, and for your own benefit only, compare your own response to the response within the *Model Answer* and rate your response from 0 (low) to 5 (high) for each of the following:

- *Completeness*: how complete was your response compared with the model answer?
- *Accuracy*: how accurate was your response compared with the model answer?
- *Quality*: How high a quality level was your response compared with the model answer?

Completeness	
Accuracy	
Quality	
Your TOTAL Score	

If you rated yourself at a total of 6 out of 15 or lower your score is lower than ideal, and we recommend you review the module again and then retry the exercise to see if you can improve upon that score.

If you rated yourself at from 7 to 9 out of 15 your score is within acceptable boundaries of competence, although it might indicate perhaps less understanding or experience in the role than a higher score would have done.

If you rated yourself at from 10 to 12 out of 15 your score reveals a good standard of competence that indicates you have understood the task and can perform it well.

If you rated yourself at 13 out of 15 or higher your score reveals a very high level of achievement for this task that indicates your mastery of the topic.