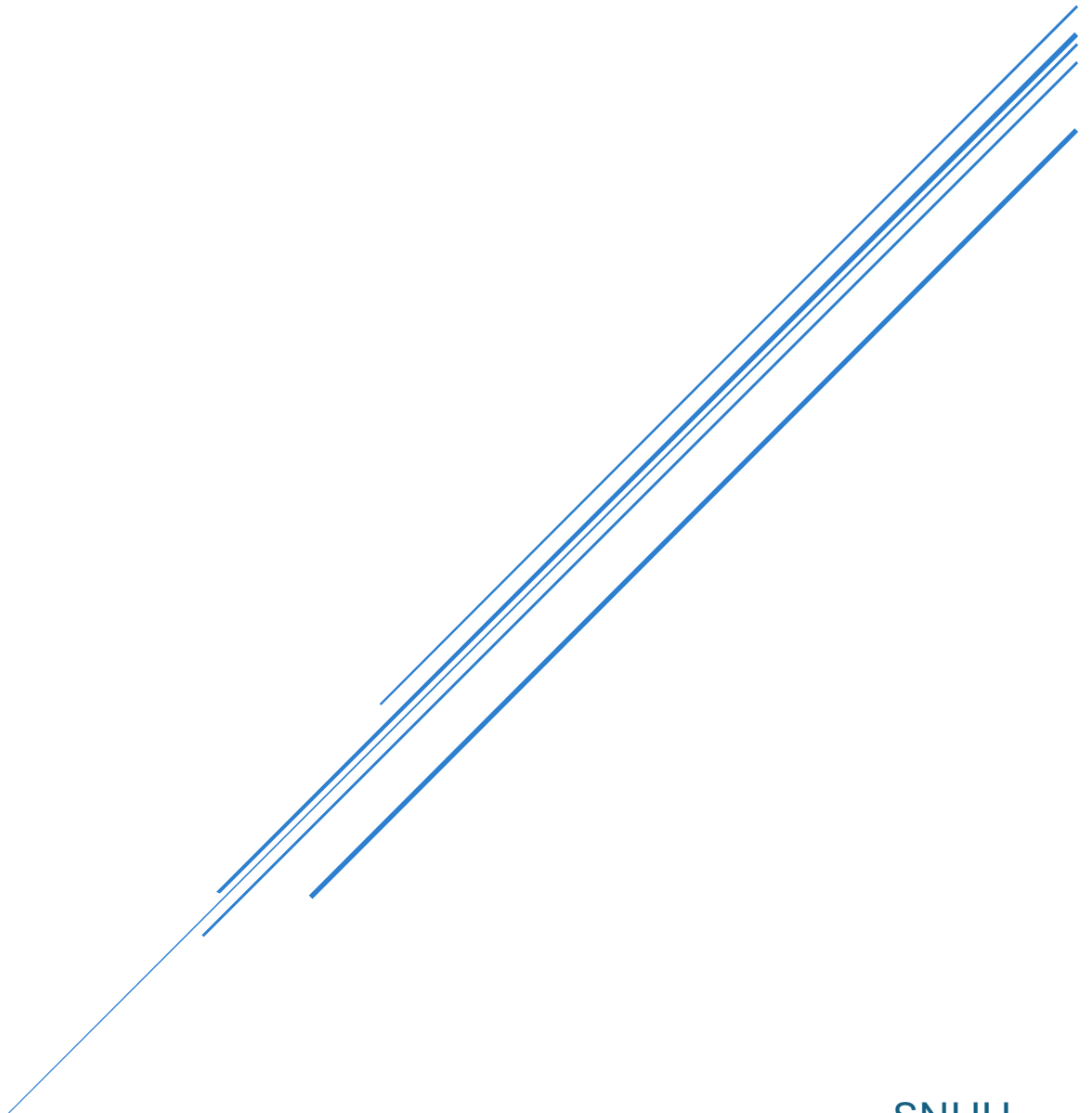# FINAL PROJECT

MIS-490: Module 7

SNHU

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<h1 style="text-align:center">Introduction</h1>

As an ABC company consultant, I was asked to analyze several data sets to find trends and insights. Through these analyses I was able to provide recommendations that ABC company used to maintain employee retention and involvement, improve customer satisfaction and retention, address late payments and recover more money, as well as improve bike availability during peak riding times. I was also asked to perform a business technology assessment and provide recommendations to address the company's current technological gaps.

By implementing the recommended initiatives, ABC company has improved their company's success while promoting a cohesive integration of all four territories. Each initiative was implemented using a phased rollout, which enabled one territory to finish an implementation before moving to the next territory. Using a phased rollout minimized issues and allowed the information learned to be applied to the succeeding territories (*What is phased rollout?: Definition from TechTarget* 2023).

Completed Implementations by Territory

Initiative	One	Two	Three	Four	% complete for all 4 territories
In-house technical training	100%	100%	0%	0%	50%
Leadership training	100%	100%	100%	0%	75%
Remote/Hybrid opportunities	100%	0%	0%	0%	25%
Wage alignments	100%	100%	0%	0%	50%
Discount payment rates	100%	100%	100%	50%	88%
Loyality programs	100%	100%	100%	100%	100%
Refer-a-friend programs	100%	75%	0%	0%	44%
Service & Price bundles	100%	75%	0%	0%	44%
Auto payment reminders	100%	100%	100%	0%	75%
Late payment fees	100%	100%	100%	0%	75%
Net terms & conditions	100%	100%	100%	0%	75%
Payment confirmation emails	100%	100%	100%	0%	75%
Sliding scale discounts	100%	33%	0%	0%	33%
	100%	83%	54%	12%	62%

Figure 1: % of Completed Initiatives by Territory

Completed Initiatives

As you can see from Figure 1, many of the recommended initiatives have been implemented in one or more territories and have been verified to ensure they were successful. Territory one is 100% complete on 13 out of 26 initiatives or 75%, whereas territory's two through four are 83%, 54% and 12% complete respectively on these 13 implementations with an overall completion rate of 62% for all four territories. These initiatives include combatting employee attrition, decreasing customer churn, and influencing prompt payments.

To address employee attrition, the company conducted in-house technical training, provided leadership training opportunities, determined remote / hybrid qualifications and enacted wage alignments. To combat customer churn, the company implemented automatic payment discounts, loyalty and refer-a-friend programs, as well as product services and price bundles. And to encourage prompt payments, the company implemented auto payment reminders, late payment fees, net terms & conditions, as well as payment confirmation emails and sliding scale discounts. For more information about employee attrition please refer to the capstone 2 element report, for more information about customer churn please refer to the capstone element 3 report, and for more information about accounts receivable please refer to the capstone element 4 report.

Business Assessment Overview

A business technology assessment was conducted to address current technical gaps within ABC company's North, South, East, and West territories, with the goal of integration. This assessment looked at the company's current technological infrastructure, and processes, as well as the associated risks and challenges associated with the proposed integration. In the initial assessment I discovered that ABC company's servers were outdated, and physically located at each territory's location, with their client machines being a mix of Windows XP, 8.0, 7.0 and 10 operating systems. All databases were hosted, updated and maintained on premises and none of

the territories had a current business Enterprise Resource Planning (ERP) system, instead they used a mix of Lotus, Excel, and Power BI for business management and reporting. Each territory was also responsible for hosting, updating and maintaining their own website. During the assessment I found that ABC company's security policies were outdated, with employees being responsible for keeping their own antivirus software up-to-date and having full control over their system, which raised serious privacy concerns. For more details about my findings please refer to the Business Technology Assessment report.

Completed Business Technology Implementations by Territory

Initiative	One	Two	Three	Four	% complete for all 4 territories
365 cloud services	100%	25%	0%	0%	31%
365 E5 cloud services	100%	25%	0%	0%	31%
AWS cloud services	100%	25%	0%	0%	31%
Replace HP computers	100%	25%	0%	0%	31%
	100%	25%	0%	0%	31%

Figure 2: % of Completed Business Technology Initiatives by Territory

As you can see from Figure 2, four out of ten or 60% of the business technology assessment initiatives are 100% complete for territory one and are 25% completed for territory two, with territories three and four awaiting implementation. These initiatives included replacing all physical servers, as well as the email server with Amazon Web Services (AWS) and Microsoft Office 365 E5 cloud services. The company has also replaced all HP computers with Dell computers in territory one and has begun this initiative in territory two. All training sessions for these implementations have been completed in territory one and territory two is set to begin AWS server, 365 and 365 E5 cloud services training in the next 14 days. Territories three and four are awaiting implementation with no set schedule. For further details about these initiatives, please see the Business Technology Assessment report.
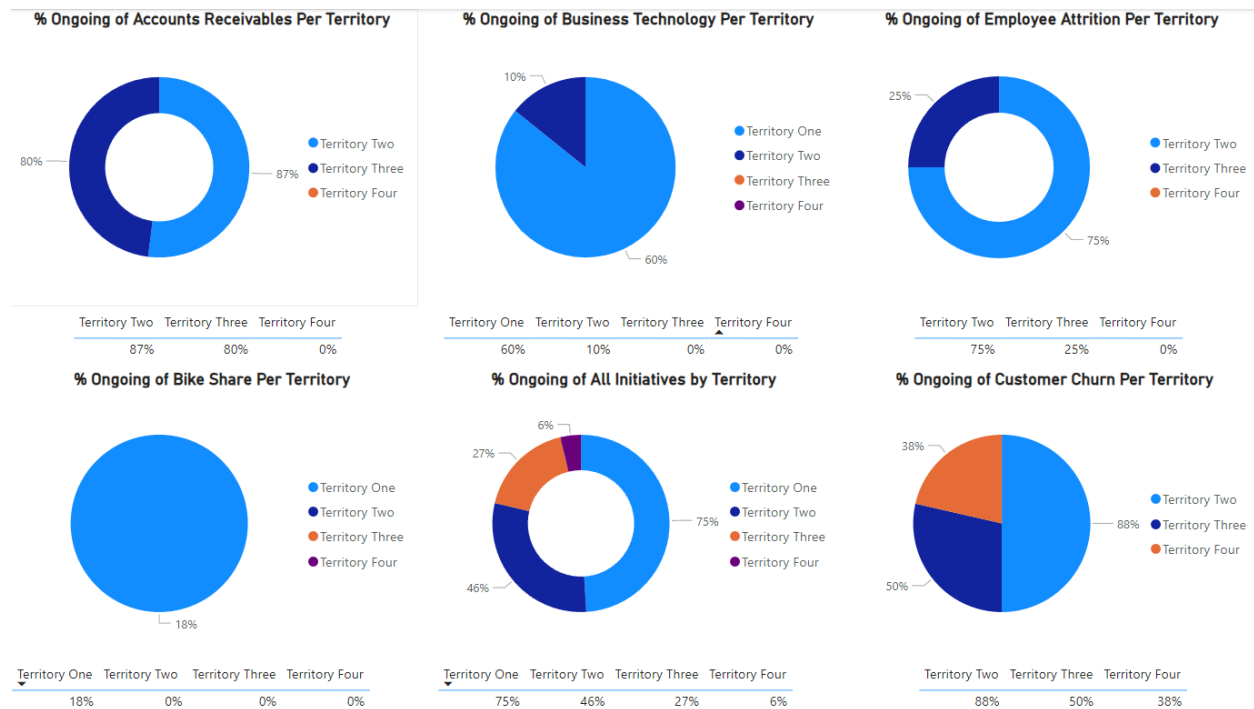
% Ongoing of Accounts Receivables Per Territory

- Territory Two
- Territory Three
- Territory Four

Territory Two	Territory Three	Territory Four
87%	80%	0%

% Ongoing of Business Technology Per Territory

- Territory One
- Territory Two
- Territory Three
- Territory Four

Territory One	Territory Two	Territory Three	Territory Four
60%	10%	0%	0%

% Ongoing of Employee Attrition Per Territory

- Territory Two
- Territory Three
- Territory Four

Territory Two	Territory Three	Territory Four
75%	25%	0%

% Ongoing of Bike Share Per Territory

- Territory One
- Territory Two
- Territory Three
- Territory Four

Territory One	Territory Two	Territory Three	Territory Four
18%	0%	0%	0%

% Ongoing of All Initiatives by Territory

- Territory One
- Territory Two
- Territory Three
- Territory Four

Territory One	Territory Two	Territory Three	Territory Four
75%	46%	27%	6%

% Ongoing of Customer Churn Per Territory

- Territory Two
- Territory Three
- Territory Four

Territory Two	Territory Three	Territory Four
88%	50%	38%

Figure 3: % of Ongoing Initiatives by Territory

Ongoing Initiatives

As you can see from Figure 3, each territory is at a varied state of completion. Territory one has completed their employee attrition, customer churn, and accounts receivables initiatives. They have completed 60% of their business technology assessment implementations but only 18% of their bike share implementations. Territory two has completed 75% of their employee attrition, 88% of their customer churn, 87% of their accounts receivable and 10% of their business assessment initiatives. Territory Two has not started their bike share implementation yet, because territory one is only 60% complete. Territory three and four are 50% and 38% complete with their customer churn initiatives respectively, whereas territory three is 80% complete with their account receivable implementations and 25% complete with their employee attrition initiatives. Neither territory has started their business assessment, or bike share implementations.

Conclusion

ABC company has been very successful with their business and technology initiatives, with 38% of all implementations, across all territories, being completed over the last several months. At this point in time, 18% of all business implementations, 50% of all employee attrition initiatives, 69% of all customer churn initiatives, 67% of all accounts receivable initiatives and 5% of the bike share initiatives have been completed across all four territories, with all initiatives set to be completed within the next 4 to 12 years. By completing these initiatives, ABC company will secure and centralize their systems, enforce their brand identity, and provide consistency, while boosting employee morale, customer satisfaction and profits. See Figure 4 through Figure 9, for more detailed information and timelines about these ongoing initiatives.

Initiative Detail and Timelines

Employee Attrition Details & Timeline

Initiative	Territory One (T1)	Territory Two (T2)	Territory Three (T3)	Territory Four (T4)	Notes
In-house technical training	100%	100%	0%	0%	T1 & T2: complete T3: Set to start in 14 days T4: Not scheduled
Wage alignments	100%	100%	0%	0%	T1 & T2: complete T3: Set to start in 14 days T4: Not scheduled
Remote / Hybrid opportunities	100%	0%	0%	0%	T1: complete T2 & T3: Set to start in 14 days T4: Not scheduled
Employee training	100%	0%	0%	0%	T1: complete T2 & T3: Set to start in 60 days T4: Not scheduled
Leadership training	100%	100%	100%	0%	T1, T2 & T3: Complete T4: Set to start in 14 days

Figure 4: Employee Attrition Details & Timeline

Customer Churn Details & Timeline

Initiative	Territory One (T1)	Territory Two (T2)	Territory Three (T3)	Territory Four (T4)	Notes
Service & Price bundles	100%	75%	0%	0%	T1: Complete T2: Set to complete in 14 days T3: Set to start in 14 days T4: Not Scheduled
Discount payment rates	100%	100%	100%	50%	T1, T2, T3: Complete T4: Set to start in 14 days
Refer-a-friend program	100%	75%	0%	0%	T1: Complete T2: Set to complete in 14 days T3: Set to start in 14 days T4: Not scheduled
Loyalty program	100%	100%	100%	100%	T1, T2, T3 & T4: complete

Figure 5: Customer Churn Details & Timeline

Accounts Receivables Details & Timeline

Initiative	Territory One (T1)	Territory Two (T2)	Territory Three (T3)	Territory Four (T4)	Notes
Net terms & conditions	100%	100%	100%	0%	T1, T2 & T3: Complete T4: Set to start in 14 days
Sliding scale discounts	100%	33%	0%	0%	T1: Complete T2: Set to complete in 60 days T3 & T4: Not scheduled
Late payment fees	100%	100%	100%	0%	T1, T2 & T3: Complete T4: Set to start in 14 days
Auto payment reminders	100%	100%	100%	0%	T1, T2 & T3: Complete T4: Set to start in 14 days
Employee training	0%	0%	0%	0%	T1: Set to start in 14 days T2: Set to start in 60 days T3 & T4: Not scheduled
Payment confirmation emails	100%	100%	100%	0%	T1, T2 & T3: Complete T4: Set to start in 14 days
Employee training	0%	0%	0%	0%	T1: Set to start in 14 days T2: Set to start in 60 days T3 & T4: Not scheduled

Figure 6: Accounts Receivables Details & Timeline

Operations Bike Share Details & Timeline

Initiative	Territory One (T1)	Territory Two (T2)	Territory Three (T3)	Territory Four (T4)	Notes
Hybrid docking system	8%	0%	0%	0%	T1: Set to complete in 9 months T2, T3 & T4: Not scheduled
Automated bike redistribution system	33%	0%	0%	0%	T1: Set to complete in 14 days T2: Set to start in 14 days T3 & T4: Not scheduled
Ride-share app	13%	0%	0%	0%	T1: Set to complete in 5 months T2, T3 & T4: Not scheduled
Develop a strategy	100%	0%	0%	0%	T1: Complete T2: Set to start in 1 week T3: Set to start in 3 weeks T4: Set to start in 5 weeks
Analysis & Planning	50%	0%	0%	0%	T1: Set to complete in 14 days T2: Set to start in 14 days T3 & T4: Not scheduled
Design	0%	0%	0%	0%	T1: Set to start in 14 days T2, T3 & T4: Not scheduled
App development	0%	0%	0%	0%	Not scheduled
Deployment	0%	0%	0%	0%	Not scheduled

Figure 7: Operations Bike Share Details & Timeline

Business Technology Details & Timeline

Initiative	Territory One (T1)	Territory Two (T2)	Territory Three (T3)	Territory Four (T4)	Notes
AWS Cloud Services	100%	25%	0%	0%	T1: Complete T2: Set to complete in 21 days T3 & T4: Not scheduled
Information Technology (IT) Training	100%	0%	0%	0%	T1: Complete T2: Set to start in 14 days T3 & T4: Not scheduled
365 E5 cloud services	100%	25%	0%	0%	T1: Complete T2: Set to complete in 14 days T3: Set to start in 14 days T4: Not scheduled
Employee Training	100%	0%	0%	0%	T1: Complete T2: Set to start in 14 days T3 & T4: Not scheduled
365 Cloud services	100%	25%	0%	0%	T1: Complete T2: Set to complete in 14 days T3: Set to start in 14 days T4: Not scheduled
Employee Training	100%	0%	0%	0%	T1: Complete T2: Set to start in 14 days T3 & T4: Not scheduled
Replace HP Computers	100%	25%	0%	0%	T1: Complete T2: Set to complete in 14 days T3: Set to start in 14 days T4: Not scheduled
Upgrade to Windows 11	75%	0%	0%	0%	T1: Set to complete in 14 days T2: Set to start in 14 days T3 & T4: Not scheduled
Employee training	0%	0%	0%	0%	T1: Set to start in 14 days T2: Set to start in 2 months T3 & T4: Not scheduled

Figure 8: Business Technology Details & Timeline

Security & group policies	0%	0%	0%	0%	T1: Set to start in 14 days T2: Set to start in 2 months T3 & T4: Not scheduled
Install Bitdefender anti-virus	0%	0%	0%	0%	T1: Set to start in 14 days T2: Set to start in 2 months T3 & T4: Not scheduled
Salesforce cloud solutions	50%	0%	0%	0%	T1: Set to complete in 3 months T2: Set to start in 3 months T3 & T4: Not scheduled
Employee training	0%	0%	0%	0%	T1: Set to start in 3 months T2: Set to start in 5 months T3 & T4: Not scheduled
ERP Cloud solution	3%	0%	0%	0%	T1: Research is complete T2, T3 & T4: No research necessary
Phase 1	0%	0%	0%	0%	T1: Set to start in 14 days T2: Set to start in 3 months T3 & T4: Not scheduled
Phase 2	0%	0%	0%	0%	T1: Set to start in 3 months T2, T3 & T4: Not scheduled
Phase 3	0%	0%	0%	0%	T1: Set to start in 12 months T2, T3 & T4: Not scheduled
Phase 4	0%	0%	0%	0%	T1: Set to start in 16 months T2, T3 & T4: Not scheduled
Phase 5	0%	0%	0%	0%	T1: Set to start in 20 months T2, T3 & T4: Not scheduled
Phase 6	0%	0%	0%	0%	T1: Set to start in 21 months T2, T3 & T4: Not scheduled
Phase 7	0%	0%	0%	0%	T1: Set to start in 2 years T2, T3 & T4: Not scheduled
One Complete Website	75%	0%	0%	0%	T1: Set to complete in 30 days T2: Set to start in 30 days T3 & T4: Not scheduled

Figure 9: Cont. Business Technology Details & Timeline

References

Contributor, T. (2023, May 8). *What is phased rollout?: Definition from TechTarget. Search IT*

Operations. https://www.techtarget.com/searchitoperations/definition/phased-rollout