

**MBA Portfolio**

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**May 5, 2002**

## Executive Summary

This electronic portfolio contains selected assignments from my core MBA courses and my specialization courses in Project Management. The assignments have been reformatted for consistency, and I attached a summary essay for each assignment. The summary essay contains a brief summary of the assignment, the reason that I chose the assignment and the key MBA learning objectives used by the assignment.

## Document Map

This document map contains a list of the assignments that I chose to include in my electronic portfolio. The document map also contains the title for each assignment and a list of the key MBA learning objectives for each assignment.

Course	Title of Project/Paper	Key MBA Objectives
MBA501	Boeing CTDC Negotiations	<ul style="list-style-type: none"> <li>Understand the complexities that are involved in managing across national and cultural boundaries.</li> <li>Identify and list challenges to effective organizational management.</li> </ul>
MBA502	Price Discrimination Analysis	<ul style="list-style-type: none"> <li>Define competitive strategy and its role in today's marketplace.</li> <li>Identify and articulate the key economic factors to building a competitive strategy.</li> <li>Demonstrate a working knowledge of competitive strategy concepts by identifying, analyzing, and proposing improvements to the competitive strategies presented in various case-based scenarios.</li> </ul>
MBA503	Performance Report May 1991	<ul style="list-style-type: none"> <li>Read and summarize financial accounting information.</li> <li>Identify and select accounting information relevant to managerial decision-making.</li> <li>Present a reasoned argument for making a business decision based on the analysis of accounting information.</li> </ul>
MBA504	Warehouse Construction Analysis	<ul style="list-style-type: none"> <li>Discuss the business opportunities and obstacles presented by data generated by financial accounting systems.</li> <li>Read and explain the significance of data presented in a financial statement.</li> <li>Prepare and present a financial analysis based on accounting data.</li> </ul>
MBA505	Cessna.com Marketing Plan	<ul style="list-style-type: none"> <li>Identify and list a variety of avenues for gathering and disseminating marketing information.</li> <li>Develop a marketing strategy that utilizes appropriate technologies.</li> <li>Research market profiles and presents avenues by which they can be reached.</li> </ul>

Course	Title of Project/Paper	Key MBA Objectives
MBA506	Making the Business Case	<ul style="list-style-type: none"> <li>• Develop a plan for the effective management of an internal information management system.</li> <li>• Establish policies for integrating an internal information management system with the Internet.</li> </ul>
MBA507	Coming Out	<ul style="list-style-type: none"> <li>• Evaluate ethical dilemmas with an understanding of their cultural, economic, and political contexts.</li> </ul>
MBA513	OIS Business Case	<ul style="list-style-type: none"> <li>• Understand the analytical techniques used in the technical evaluation and design of communication projects.</li> <li>• Know how these techniques are used in problem solving, strategic planning, and re-engineering.</li> <li>• Apply these analytical techniques to actual problems encountered by communication professionals.</li> </ul>
MBA514	CIKM Business Plan – Paper Storyboard	<ul style="list-style-type: none"> <li>• Understand the Internet in business by actually using the Internet to solve business-related problems.</li> <li>• Understand customer-driven marketing issues and how companies can reach global customers.</li> <li>• Develop case analysis and problem solving skills to assist in making financial decisions to develop new Internet-based applications.</li> <li>• Understand the principles of effective customer service strategies and methods of supporting customers through an Internet service.</li> <li>• Understand the critical success factors for using the Internet, including improving financial and communication goals.</li> <li>• Know basic HTML coding and principles of web page development.</li> </ul>
MBA571	Brantley Research Initiation Phase Project Plan	<ul style="list-style-type: none"> <li>• Develop a plan that guarantees that all of the various elements of a project are properly coordinated.</li> <li>• Plan for the necessary resources, accurately estimate cost, allocate the budget to specific work items, and control changes in the project budget.</li> </ul>
MBA572	CI/KM Technologies Business Initial Business Formation Project	<ul style="list-style-type: none"> <li>• Clearly identify the scope of a project.</li> <li>• Develop a realistic project time line.</li> <li>• Estimate the costs of the resources needed to complete the project.</li> <li>• Establish criteria for periodically evaluating the quality of work in progress.</li> </ul>
MBA573	CI/KM Technologies Risk Mitigation Plan	<ul style="list-style-type: none"> <li>• Evaluate and manage necessary risks associated with the project.</li> </ul>
MBA574	Using the Balanced Scorecard© To Plan Projects and Evaluate Deliverables	<ul style="list-style-type: none"> <li>• Apply best practice in the area of strategic management to the development, implementation, and evaluation of a project.</li> <li>• Evaluate the potential strategic impact of a proposed project.</li> </ul>

### **MBA501 Summary Essay Boeing CTDC Negotiations**

The assignment was to analyze negotiations between Boeing and CTDC of Japan for the construction of a new commercial aircraft. The reasons that I chose this example are that it was a good example of how culture is important in international negotiations and how to determine the short-term and long-term consequences of a negotiation. The key MBA learning objectives are:

- Understand the complexities that are involved in managing across national and cultural boundaries.
- Identify and list challenges to effective organizational management.

MBA 501  
Application 4.1  
Bill Brantley

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### **Boeing CTDC Negotiations**

Boeing's motives for entering into the joint production with CTDC were based on the short-term goals of lowering their costs of production and sharing the risk of producing a new aircraft model. The Japanese were considered good partners because they have the manufacturing expertise and financial backing that would give Boeing a short-term advantage in the partnership. According to the terms of the negotiations, CTDC would absorb the cost of component development, assumed the market and currency risk and agreed not to share in the profits. On the surface, it appears that Boeing incurred almost no costs in the deal and would get to keep the profit while the Japanese took all the risk without any return on their investment.

Essentially why would the Japanese, who are considered to be crafty negotiators with very astute business leaders agree to such a deal even to the point of allowing Boeing to negotiate in English and in the traditional American manner? Because the Japanese had a different agenda based on a long-range goal of dominating the airline industry as they did the automobile industry during the 1980s. The

Japanese realized that the potential market for air travel will grow in the next few decades and they also realized that the US currently dominated the market. As a way of rapidly entering and growing into a major player in the airline market, Japan was willing to make whatever deal was necessary so that they could convince Boeing to join in a joint-production deal with them.

As Boeing's history shows, it has been on the forefront of aerospace technology. Boeing created the first popular commercial airliner (DC-3) was heavily involved in the US space program and created many US military aircraft. Boeing's expertise and knowledge is very valuable and the costs of reproducing the skill and knowledge base that Boeing has would be astronomical and very difficult given the number of fundamental patents that Boeing controls. By entering into a joint-production agreement, CTDC will have access to both tacit and non-tacit components of the airline manufacturing process as developed by Boeing. Beyond that, CTDC will also have access to Boeing's top engineers and designers and can learn their methods of planning and design that will help CTDC beyond this project. Japan is well known for its competitive intelligence expertise and they have been quite

diligent in learning and applying Western business methods and practices since the end of World War II.

As many critics have claimed, this is a "Faustian deal" for Boeing as in CTDC will be able to "steal" all of Boeing's manufacturing and design knowledge for a short-term bump in profits. As critics point out, this is the only reason that the Japanese agreed to such a lopsided deal. It is well known that the Japanese Ministry of Economy, Trade and Industry (formerly Ministry of International Trade and Industry) engages in industrial targeting and this policy has helped Japan dominate such markets as televisions, automobiles and consumer electronics. And the Japanese to take decades and absorb profit losses as long as they will come to eventually dominate the target market and drive out competitors.

But Boeing also has an opportunity to turn this deal around. The Japanese have pioneered many manufacturing innovations and have perfected the art of driving down production costs while maintaining high quality. So, there are things that Boeing can learn and use in their manufacturing. Additionally, because the Japanese are willing to absorb the risk, Boeing can be more experimental in the design, planning and production of the new aircraft. Boeing can afford to turn this opportunity into a chance to

learn new production techniques and try some cutting-edge technologies in creating the aircraft. So, this deal could still work out Boeing's favor both in the short-term and long-term.

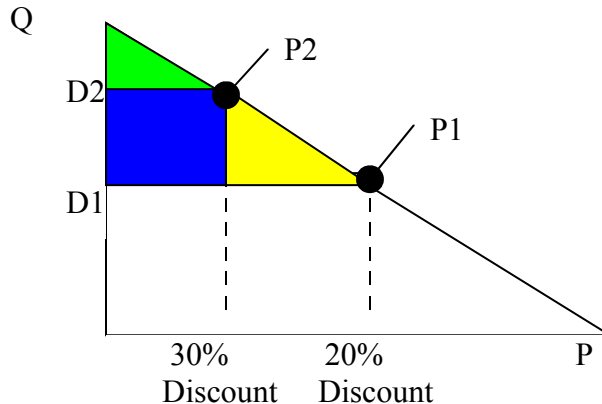
### **MBA502 Summary Essay Price Discrimination Analysis**

The assignment required an analysis of ABC Cereals' change in pricing strategy and how it affected big supermarkets and small supermarkets. This analysis is a good example of how economic analysis can be used to aid in strategic management and determining the legal consequences of an economic decision. The key MBA learning objectives are:

- Define competitive strategy and its role in today's marketplace.
- Identify and articulate the key economic factors to building a competitive strategy.
- Demonstrate a working knowledge of competitive strategy concepts by identifying, analyzing, and proposing improvements to the competitive strategies presented in various case-based scenarios.

Module 5.1) Price Discrimination  
 William Brantley  
 October 15, 2000

ABC Cereals is practicing third degree price discrimination because it is relying on the higher demand elasticity present in Big Supermarket to capture more customer surplus. The diagram below demonstrates the rationale behind ABC Cereals' decision:



Before ABC Cereals' decision, the blue, green and yellow areas combined represented the customer surplus enjoyed by Big Supermarket. After the discount was increased to 30% (thus lowering the wholesale price of ABC Cereals' product, ABC Cereals captured part of Big Supermarket's customer surplus (the yellow area) in the form of increased demand. Additionally, Big Supermarket's customer surplus is reduced to just the green area.

By this decision, ABC Cereals is able to compete more effectively against the wider range of cereal brands in Big Supermarket (assuming that the name implies that Big Supermarket is bigger than the average supermarket) while still being able to enjoy a higher price in other supermarkets where ABC Cereals wouldn't face as many competitors (the demand elasticity would be less elastic).

This is a violation of the Robinson-Patman Act and specifically, 15 U.S.C Section 13 (e) because ABC Cereals is discriminating in favor of Big Supermarket by offering its product at a lower price than is enjoyed by other supermarkets. To quote the relevant passages:

“It shall be unlawful for any person to discriminate in favor of one purchaser against . . . purchasers of a commodity bought for resale . . . [by] offering for sale of such commodity so purchased upon terms not accorded to all purchasers on proportionally equal terms.”

The smaller supermarkets and grocers are most harmed by this decision because they still have to sell ABC Cereals' products at a higher price than Big Supermarket and will lose a certain percentage of customers to Big Supermarket. Additionally, if sales of ABC Cereals' drops to a certain point, many smaller supermarkets may drop ABC Cereals' products from their shelves causing less consumer choice among cereals in the smaller supermarkets especially if other cereal manufacturers copy Big Supermarket's strategy.

**MBA503 Summary Essay  
Performance Report May 1991**

The assignment was to analyze a manufacturing company's variable and fixed costs to determine why it was not reaching projected costs and production outputs. I chose this because it shows how accounting methods can be used to reveal hidden costs and how a management decision like sales strategy can impact a company's profitability.

The key MBA learning objectives are:

- Read and summarize financial accounting information.
- Identify and select accounting information relevant to managerial decision-making.
- Present a reasoned argument for making a business decision based on the analysis of accounting information.

**Performance Report, May 1991**

	<b>Budget</b>	<b>Per/Unit</b>	<b>Actual</b>	<b>Per/Unit</b>	<b>Variance</b>	<b>Budgeted(Per/Unit)-Actual(Per/Unit)</b>
<b>Units</b>	18,000		14,000		4,000	
	864,000.0	48.0	686,000.0	49.0	178,000.0	
<b>Sales</b>	0	0	0	0	0	(1.00)
<b>Variable Manufacturing Costs</b>						
	108,000.0	6.0	85,400.0	6.1	22,600.0	
<b>Direct Material</b>	0	0	0	0	0	(0.10)
	288,000.0	16.0	246,000.0	17.5	42,000.0	
<b>Direct Labor</b>	0	0	0	7	0	(1.57)
	57,600.0	3.2	44,400.0	3.1	13,200.0	
<b>Indirect Labor</b>	0	0	0	7	0	0.03
	14,400.0	0.8	14,200.0	1.0		
<b>Idle Time</b>	0	0	0	1	200.00	(0.21)
	10,800.0	0.6	10,000.0	0.7		
<b>Cleanup Time</b>	0	0	0	1	800.00	(0.11)
	<u>5,200.0</u>	<u>0.2</u>	<u>4,000.0</u>	<u>0.2</u>	<u>1,200.0</u>	
<b>Miscellaneous Supplies</b>	<u>0</u>	<u>9</u>	<u>0</u>	<u>9</u>	<u>0</u>	0.00
	484,000.0	26.8	404,000.0	28.8	80,000.0	
<b>Total Variable Manufacturing Cost</b>	0	9	0	6	0	(1.97)
	<u>28,800.0</u>	<u>1.6</u>	<u>28,000.0</u>	<u>2.0</u>		
<b>Variable Shipping Costs</b>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>800.00</u>	(0.40)
	512,800.0	28.4	432,000.0	30.8	80,800.0	
<b>Total Variable Costs</b>	0	9	0	6	0	(2.37)
	351,200.0	19.5	254,000.0	18.1	97,200.0	
<b>Contribution Margin</b>	0	1	0	4	0	1.37
<b>Nonvariable Manufacturing Costs</b>						
	57,600.0	3.2	58,800.0	4.2	1,200.0	
<b>Supervision</b>	0	0	0	0	0	(1.00)
	20,000.0	1.1	20,000.0	1.4		
<b>Rent</b>	0	1	0	3	-----	(0.32)

	60,000.0	3.3	60,000.0	4.2		
<b>Depreciation</b>	<u>0</u>	3	<u>0</u>	9	-----	(0.95)
	<u>10,400.0</u>	0.5	<u>10,400.0</u>	0.7		
<b>Other</b>	<u>0</u>	8	<u>0</u>	4	-----	(0.17)
	148,000.0	8.2	149,200.0	10.6	1,200.0	
<b>Total Nonvariable Manufacturing Costs</b>	<u>0</u>	2	<u>0</u>	6	0	(2.43)
	<u>112,000.0</u>	6.2	<u>112,000.0</u>	8.0		
<b>Selling and Administrative Costs</b>	<u>0</u>	2	<u>0</u>	0	-----	(1.78)
<b>Total Nonvariable and Programmed Costs</b>	<u>260,000.0</u>	14.4	<u>261,200.0</u>	18.6	<u>1,200.0</u>	
	<u>0</u>	4	<u>0</u>	6	<u>0</u>	(4.21)
	91,200.0	5.0	(7,200.0	(0.5	(98,400.0	
<b>Operating Income (Loss)</b>	<u>0</u>	7	<u>0)</u>	1)	0)	

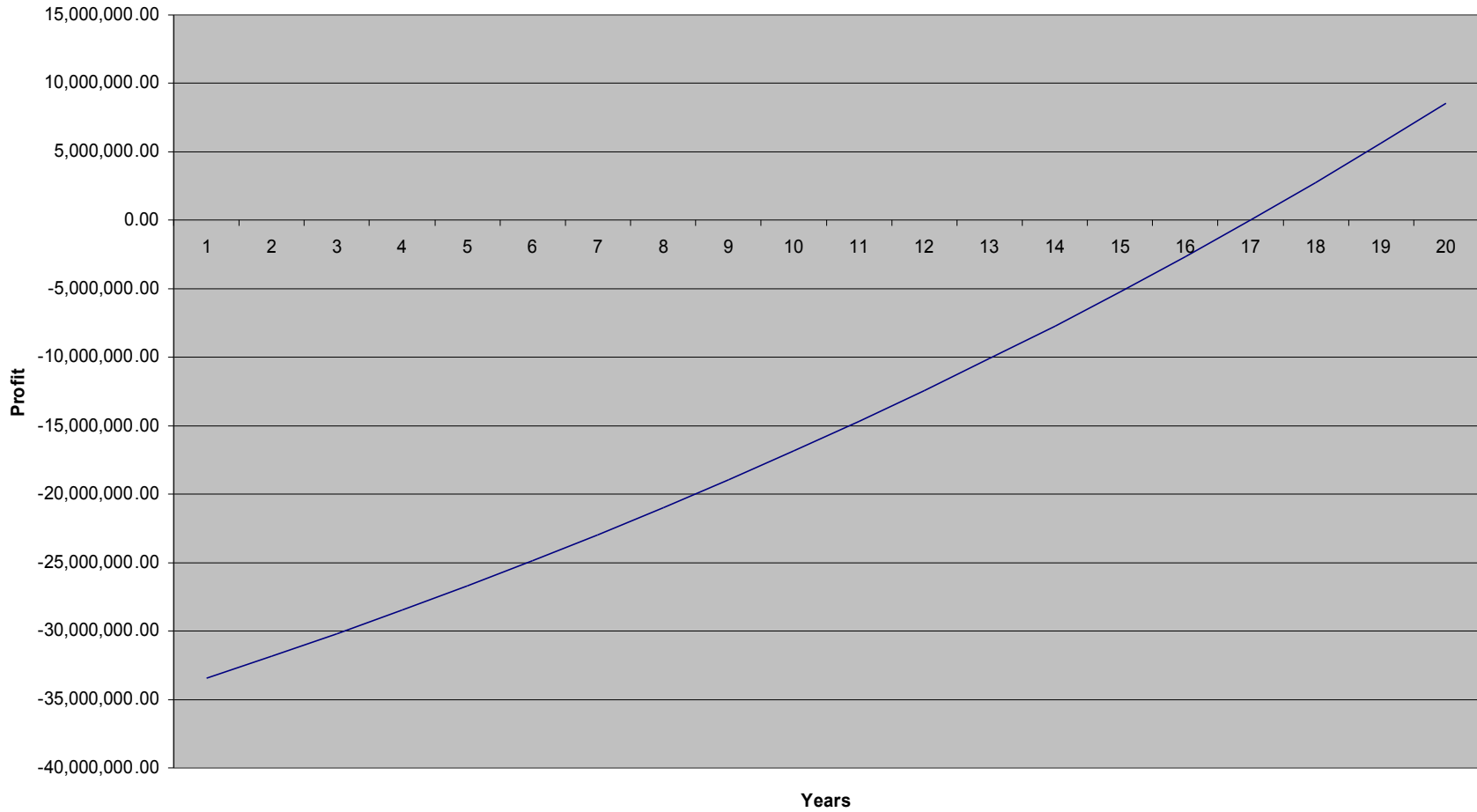
When you break the various costs down per the unit, you can see why there was an operating loss for May 1991. In all but one category of variable manufacturing costs, it was more expensive to make 14,000 units than what was budgeted for 18,000 units. Even if sales was successful in selling each unit for a dollar more than what was projected, the actual costs of the product was far more expensive to produce than what was budgeted for. Bottom line, what should have cost only \$42.93 to make 18,000 units of actually cost \$49.52 to make only 14,000 units.

### **MBA504 Summary Essay Warehouse Construction Analysis**

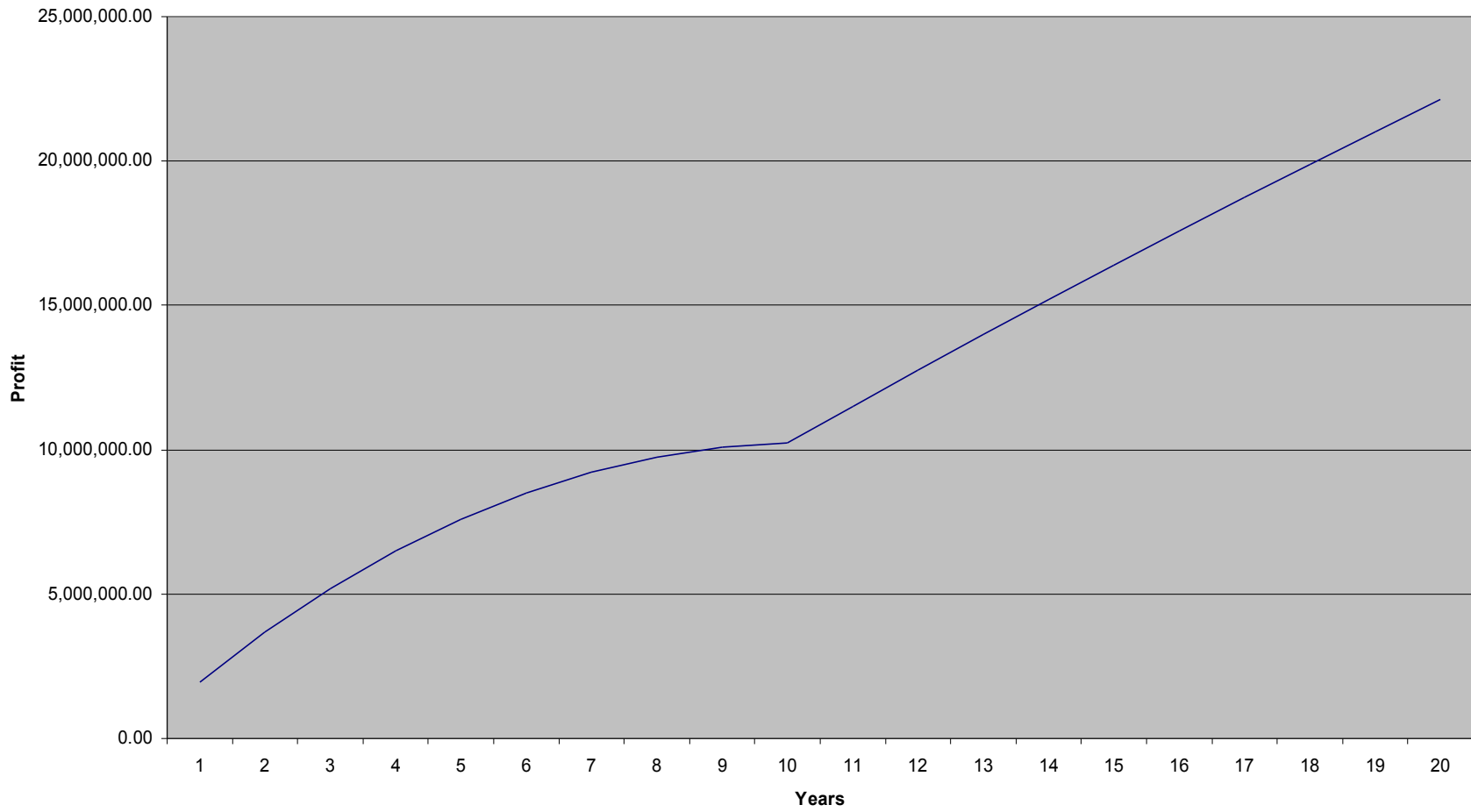
In this assignment, I analyzed the net present value of building a warehouse under three different scenarios. The first scenario was an initial investment of \$35 million to build the warehouse and an anticipated \$1.5 million in operating costs over twenty years. The second scenario involved renting a warehouse over twenty years. The third scenario was also an initial investment of \$35 million and an anticipated \$1.5 million in operating costs over thirty years. This assignment demonstrated the value of making management decisions based on sound financial principles such as net present value.

The key MBA learning objectives are:

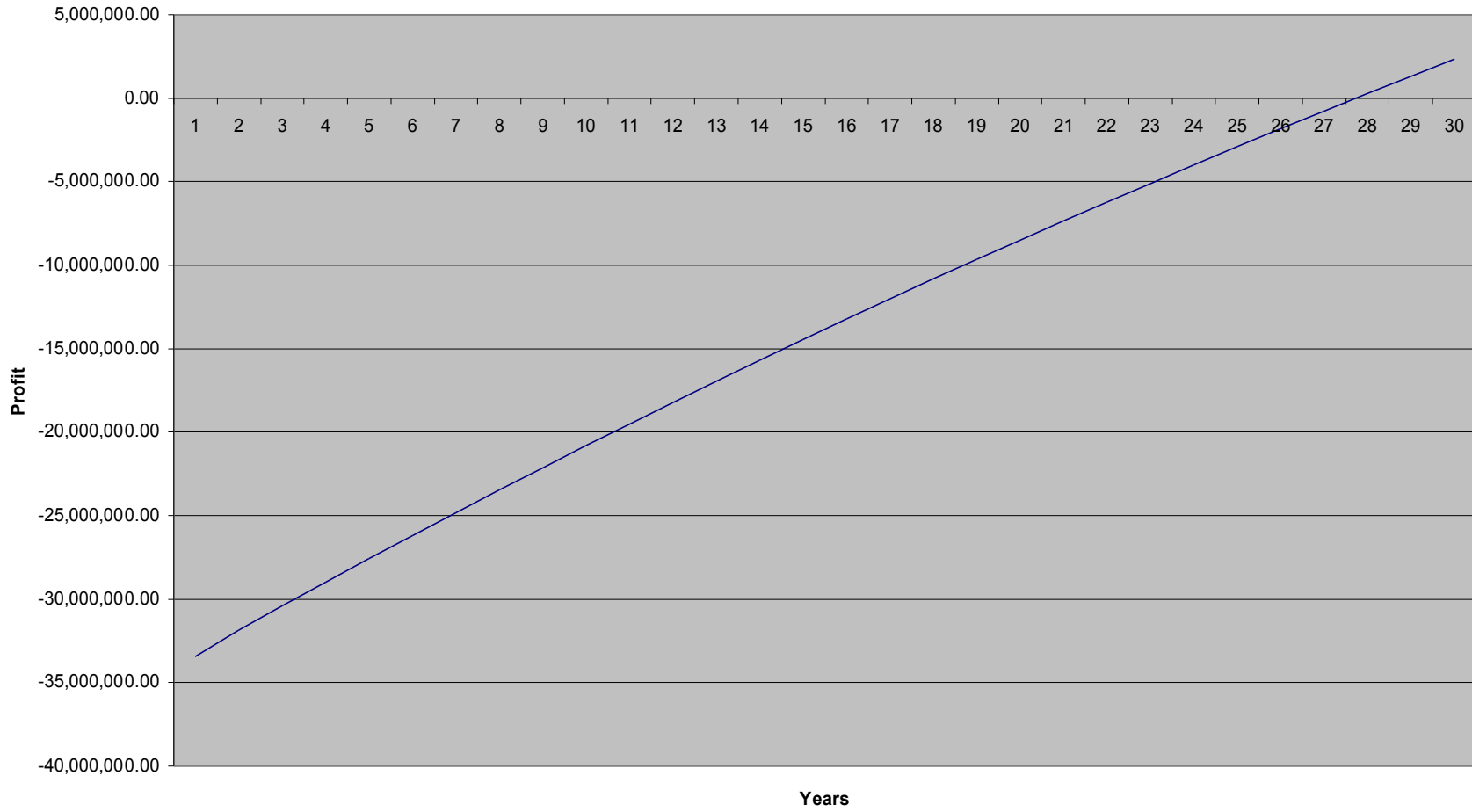
- Discuss the business opportunities and obstacles presented by data generated by financial accounting systems.
- Read and explain the significance of data presented in a financial statement.
- Prepare and present a financial analysis based on accounting data.



Scenario A



Scenario B



Scenario C

### **MBA505 Summary Essay Cessna.com Marketing Plan**

For this assignment, I was to analyze an existing website and develop a plan to improve the marketing features of the website. This assignment was a good example of how to create website features that would help a company in building a Customer Information File database.

The key MBA learning objectives are:

- Identify and list a variety of avenues for gathering and disseminating marketing information.
- Develop a marketing strategy that utilizes appropriate technologies.
- Research market profiles and presents avenues by which they can be reached.

**Cessna Aircraft Company**  
**Cessna.com Marketing Plan**

**MBA 505**  
**Application 8.1**  
**Bill Brantley**  
**12/1/01**

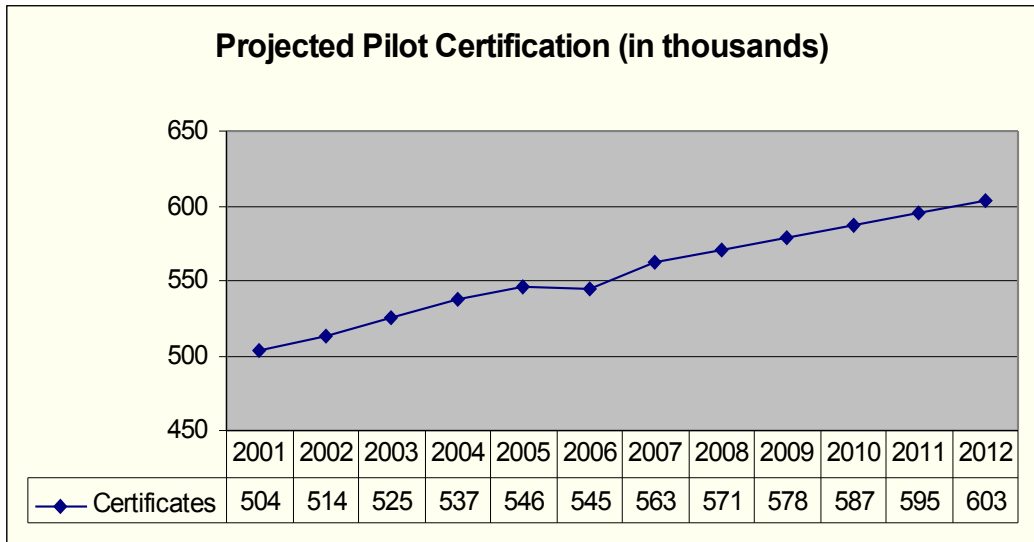
**Executive Summary**

Cessna Aircraft Company is the United State’s largest manufacturer of private piston, turbo-prop and business jets and has been in business since 1927. Its aircraft are used for training, recreation, private air transport and business travel and its customers range from private pilots to many of the Fortune 100 companies. Cessna is also a major partner in many of the leading pilot training schools across the United States.

For the purposes of this report, only Cessna’s website, Cessna.com will be analyzed in terms of how it can be improved using one-to-one marketing techniques. Based on analysis of Cessna.com and two competitor websites (www.learjet.com and www.newpiper.com) Cessna should redesign its website to accomplish the following four goals:

1. Personalize the customer experience in choosing and financing an aircraft.
2. Assist the sales staff in identifying and profiling potential customers.
3. Aid in developing customer’s career path.
4. Become an integral part of the larger customers’ transportation departments.

According to Federal Aviation Administration Projections, certifications for all pilots (excluding commercial airliners) are expected to grow or remain steady. The changes to Cessna.com will help to capture the market for new pilots while retaining our current customer base.



### **Customer Information File and Information-Intensive Strategies**

Cessna has three major product lines that can be divided among four major customer types: recreational, small-business, utility pilots and business travel. Currently, the website doesn't allow for personalization or attempts to capture any kind of customer information from website visitors. Therefore, Cessna.com should add a "My Cessna.com" component to the website to allow customers to create and personalize a start page tailored to their particular model of aircraft and use of aircraft. The goal of this component is to begin building a Customer Information File that would capture the following information:

- Demographic information
  - Sex, age, location, personal income
- Business or Recreational owner
- If business owner:
  - Type of business
  - Customers
  - Aircraft use
- Flight training
  - How much training
  - Certifications: current and anticipated
  - Future career plans in regards to aviation
- Product purchased
  - When plane was purchased
  - How was the purchase financed
  - Age of the product
  - Use of product
  - Planned future purchases

By capturing this information, Cessna can use the personalized start page to inform the customer of new product offerings and assist them with their current product. The start page will allow Cessna to utilize the following types of information-intensive strategies.

#### **Mass Customization**

Currently, Cessna.com gives general information about product specifications and pricing and encourages the visitor to call their local dealer for more specific information. By personalizing the experience for the customer, Cessna can automate much of the sales process, answer common customer questions and allow their sales personnel on sales closings. The following example shows how this is accomplished:

A visitor (who holds a private pilot's certificate and owns an aircraft that is ten-years old) registers a "My Cessna" start page. The visitor is

interested in purchasing a new aircraft and they begin browsing the “Buy a Cessna Plane” section of the website. The visitor begins by picking the model type, color, avionics package, etc. At each stage of the process, this information is added to the customer’s row in the Customer Information File. When the visitor is finished with choosing and customizing the product, a preliminary price page is generated and various financing options are explained. The visitor then has the option to modify the product in response to the price or they can save the information generated to that point. When the information is saved, a sales representative in the visitor’s location is automatically notified of the prospect’s name and product choice. From there, the sales representative can further research the prospect and set up a sales call. Also, depending on the financing choice, the relevant persons can also be consulted and present for the sales call.

### **Yield Management**

Another useful aspect of the Cessna Customer Information File is the ability to determine what aircraft products customer’s are buying and why. For example, Cessna could release a new model with a certain avionics package and then monitor how well that model sells in relation to other models including competing models. By determining the price sensitivity of various customer segments, Cessna can determine whether it should drop prices in response to a competitor or dismiss the threat. Cessna can also determine what product bundles (plane, avionics and furnishings) are most in demand by aggregating the data from the “Buy a Cessna Plane” module of the website.

### **Capturing the Customer and Event-Oriented Projecting**

Pilot certification has a fixed path and by capturing where a pilot is in their training and what their future training plans are, Cessna can better serve the customer and determine the “magic moments” when they would be most receptive to marketing.

For example, a student pilot registers their start page at the very beginning of their training. In the first twenty hours of training, the student pilot works with an instructor in learning the basic visual flight maneuvers and then in the next twenty hours, the student pilot is allowed to solo fly. This student pilot uses a start page feature that allows them to store their logbook data online. When the logbook shows the student has reached the forty-hour mark, Cessna can send them a congratulatory message along with suggested private planes that the student could purchase.

Additionally, the “My Cessna” start page can also allow the visitor to store information about their aircraft. By monitoring this information, Cessna can alert customers to recommended maintenance, updates to the product and even suggest new purchases based on past preferences. And it can help sales personnel in the same location as the visitor to provide personalized and detailed attention to customers.

### **Extended Organization**

For the customers who own the utility and business jet aircrafts, Cessna can become their virtual transportation department. For these customers, Cessna.com will build a specialized website or websites that allow customers to maintain maintenance, aircraft financial and vendor records online. This website will also provide extended maintenance documentation and host an online community of owners that can serve as an informal experts group for new owners. By providing these enhanced business services, Cessna can better determine how their aircraft are utilized and build future models based on that information along with customer feedback.

Another group that can benefit from this alliance is Cessna's partners such as flight schools and aircraft maintenance companies. For aircraft training schools, Cessna can direct visitors toward Cessna partner schools thus increasing enrollment for those schools while increasing demand for Cessna training aircraft. In the case of aircraft maintenance companies, Cessna can recommend Cessna trained and approved companies that will correctly repair the Cessna aircraft. This will cut down on aircraft accidents due to poor maintenance and enhance Cessna's safety image.

### **Competitor Analysis**

Currently, there are two major competitors to Cessna: Piper Aircraft and Learjet. Piper Aircraft is also based in the United States and it manufactures private and small-business piston aircraft. Learjet is part of the French aerospace company, Bombardier Aerospace, and it's a leading business jet company. Each has a comparable website in terms of design and content to Cessna's but Learjet offers a more personalized experience in its "Customer Info Center" that appears to offer the same capabilities as the proposed "My Cessna" start page.<sup>1</sup> To remain competitive with Learjet, Cessna.com also needs to add the above-mentioned personalization features.

### **Conclusion**

Cessna.com is an attractive and well-designed website that is very user-friendly and enticing. But where it fails is that it is designed for a general audience and doesn't take advantage of the new web technologies to turn interested browsers into potential customers. By providing a personalized start page for visitors, specialized website(s) for utility and business jet customers and the "Buy a Cessna Plane" sales automation module, Cessna.com is missing the chance to build a Customer Information File that will allow it to the use five information-intensive strategies to capture a growing market of potential aircraft owners.

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<sup>1</sup> This required an existing customer account so I was not able to access that part of the website, but I was able to determine some of the services based on the main Customer Support page.

### Appendix: Future Projections of Pilot Certifications

#### Future Pilot Certifications By Category (In Thousands)

<b>Year</b>	<b>Students</b>	<b>Recreational</b>	<b>Private</b>	<b>Commercial</b>	<b>Total</b>
<b>2001</b>	107.6	0.3	267.4	128.4	503.7
<b>2002</b>	110.5	0.4	272	130.6	513.5
<b>2003</b>	113.5	0.4	277.5	133.3	524.7
<b>2004</b>	116.6	0.4	283.7	136.3	537
<b>2005</b>	119.7	0.4	288	138.3	546.4
<b>2006</b>	113.5	0.4	291.4	139.9	545.2
<b>2007</b>	126.2	0.4	294.6	141.5	562.7
<b>2008</b>	129.6	0.4	297.6	142.9	570.5
<b>2009</b>	133.1	0.4	300.6	144.3	578.4
<b>2010</b>	136.7	0.4	303.6	145.8	586.5
<b>2011</b>	140.4	0.4	306.6	147.3	594.7
<b>2012</b>	144.2	0.4	309.6	148.8	603

### **MBA506 Summary Essay Making the Business Case**

During this course, I studied a start-up Internet consulting business, Digital Business Solutions, and how it could use telecommunication technologies to help it become more efficient and effective. I chose this assignment because it combined both the technical information that I learned in the readings and some financial analysis that I learned in MBA504 in order to develop an information technology plan that is both technically feasible and cost effective.

The key MBA learning objectives are:

- Develop a plan for the effective management of an internal information management system.
- Establish policies for integrating an internal information management system with the Internet.

**17 Making the Business Case**  
**MBA 506**  
**Information Technology Management**

**Bill Brantley**  
**1/18/2002**

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## Assignment

Reflect back on the E-Business system you proposed back in the assignment for Module 3 and now put some teeth into their proposal.

- In a 300-400 word paper describe the one-time versus recurring tangible costs, intangible costs, the tangible benefits, and the intangible benefits.
- Describe the various forms of feasibility for the proposed system.
- Then, based on your quantitative and qualitative analyses, recommend a course of action for the proposed system.

Post your paper to the forum and email it to me. Review the postings of your peers and comment as appropriate.

## Term definitions

One-time costs – Costs that occur once during the life of the system, typically during project initiation (Information Systems Foundations, Leonard M. Jessup and Joseph S. Valachich; 1999; p G-6).

Tangible costs – Costs that can be easily measured in dollars and with certainty (Ibid G-9).

Intangible costs – Costs that cannot be easily measured in dollars or with any certainty (Ibid G-5).

Tangible benefits – Benefits that are easily measured in dollars and with certainty (Ibid G-9).

Intangible benefits – Benefits that are not easily measured in dollars or with any certainty (Ibid G-5).

DBS – Digital Business Solutions

## Overview

DBS plans to expand into a regional presence over the next three-to-five years by hiring part-time and contractors in different cities. DBS will handle the marketing, sales servicing and all other administrative functions while the contractors will handle web design, graphics and programming tasks. DBS will need a way to store and manage the files created by their contractors, communicate with their contractors and manage numerous projects spread out over large geographic distances. Currently, DBS has an interoffice LAN that is connected to the Internet through DSL. What DBS would like to do is create an extranet so that they can offer limited access to their LAN while keeping key systems such as accounting secure and private.

## Cost/Benefits Analysis

Here are the highlights from the economic feasibility analysis:

- NPV of all benefits - \$1,671,745 (over a five-year period)
- NPV of all costs - \$982,492 (over a five-year period)
- Overall NPV - \$689,253
- Overall ROI – 70%
- Breakeven point – Year two over the five-year period

### **Intangible Costs/Benefits Analysis**

The extranet's major intangible benefits will be in the growth and renewal of DBS. By creating a geographically-diverse and technologically-diverse group of developers, DBS hopes to create a synergistic effect in their development as developers learn from each other and merge disparate web technologies into new services and products.

Conversely, DBS also anticipates a rise in administrative complexity as a cost of the extranet. Dealing with developers who in are different areas and time zones will require more communication to insure that consensus is reached on projects. Additionally, paying for and accounting for taxes and benefits among the different state systems will add to the administrative burden.

### **Feasibility of the Proposed System**

Examining each feasibility type in turn:

- Technical – Given the proposed training and the fact that the server is basically plug-an-play, it shouldn't take more than a couple of days to install and configure the server.
- Operational – The server is vital to creating the extranet that will support the remote developers and allowing DBS to expand geographically. The server configuration is more than enough to support the projected staff of twelve developers.
- Schedule – Again, the server will be quickly set-up and allow DBS to start adding remote developers within a week of installation.
- Legal and contractual – The server is covered by the company's insurance and is adequately backed-up. An attorney will have to be retained to draft the remote developer's work contracts and intellectual property issues but that is outside the scope of the current project.
- Political – Top management realizes the need for an extranet and supports the concept in general.

### **Recommendation**

Based on the future business plans of DBS and their need to expand geographically, I would recommend that they adopt the present plan. It will pay for itself in the second-year and their ROI is quite substantial.

### DBS Economic Feasibility Analysis

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	TOTALS
Average Client Revenue	\$ 2,500.00	\$ 3,000.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	
Monthly Hosting & Maintenance	\$ 150.00	\$ 150.00	\$ 150.00	\$ 150.00	\$ 150.00	\$ 150.00	
Number of Clients	20	100	150	200	250	300	
Net Economic Benefit	\$53,000	\$315,000	\$547,500	\$730,000	\$912,500	\$1,095,000	
Discount Rate (12%)	1	0.88	0.7744	0.681472	0.59969536	0.527731917	
PV of Benefits	\$53,000	\$277,200	\$423,984	\$497,475	\$547,222	\$577,866	
NPV of All Benefits	\$53,000	\$330,200	\$754,184	\$1,251,659	\$1,798,881	\$2,376,747	<b>\$2,376,747</b>
<b>One-Time Costs</b>							
Server	\$ (6,279.00)						
Training	\$ (200.00)						
Misc. Equipment	\$ (521.00)						
Subtotal	\$ (7,000.00)						
<b>Recurring Costs</b>							
Connection	\$ (600.00)	\$ (600.00)	\$ (600.00)	\$ (600.00)	\$ (600.00)	\$ (600.00)	
Salary	2	4	6	8	10	12	
No. of Developers	\$ (30,000.00)	\$ (31,500.00)	\$ (33,075.00)	\$ (34,728.75)	\$ (36,465.19)	\$ (38,288.45)	
Total Salaries	\$ (60,000.00)	\$ (126,000.00)	\$ (198,450.00)	\$ (277,830.00)	\$ (364,651.88)	\$ (459,461.36)	
Equipment Maintenance	\$ (100.00)	\$ (100.00)	\$ (100.00)	\$ (100.00)	\$ (100.00)	\$ (100.00)	
Discount Rate (12%)	1	0.88	0.7744	0.681472	0.59969536	0.527731917	
PV of Recurring Costs	\$ (67,100.00)	\$ (110,968.00)	\$ (153,757.12)	\$ (189,401.51)	\$ (218,740.01)	\$ (242,525.20)	
NPV of All Costs	\$ (67,100.00)	\$ (178,068.00)	\$ (331,825.12)	\$ (521,226.63)	\$ (739,966.64)	\$ (982,491.84)	<b>\$ (982,491.84)</b>
Overall NPV							<b>\$1,394,255.19</b>
Overall ROI							141.91%

### **MBA507 Summary Essay Coming Out**

In this course, I learned how to evaluate ethical situations based on three different philosophical perspectives. This was a great class with a good amount of online discussion. I chose this assignment as an example of how the class helped me analyze and justify my position in an ethical argument.

The key MBA learning objective is:

- Evaluate ethical dilemmas with an understanding of their cultural, economic, and political contexts.

MBA 507  
Application 3.2  
Bill Brantley

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### **Coming Out**

Since 1993, it seems that public acceptance of gays has been more open starting with the appointments of openly-gay individuals to Federal government positions under Clinton and Bush; the increasing number of gay singers, television and movie stars; the defeat of several public initiatives for criminalizing homosexual conduct and companies are starting to recognize domestic partners in their healthcare and insurance policies. There are still parts of society that resist approving or even tolerating homosexuals but this has become rarer and in some cases even condemned (example: Jerry Falwell's statement blaming the events of September 11<sup>th</sup> on, among other, homosexuals). But society is still a long way from fully accepting homosexuality as just another lifestyle.

Given that Adam worked for a securities firm with "conservative clients", I think that George Campbell would still have reservations about Adam bringing his companion with him to the dinner but I think that George would ask that Adam keep it low-key while he is at the dinner. In other words, "don't ask, don't tell." But, I think that George will still view Adam as a valuable employee and this won't be as detrimental to Adam's career as it may have been eight years ago.

Companies should only concern themselves about how their employees bring value to their business and not delve into their employee's personal lives unless it interferes with their performance on the job. Homosexuality has never been shown to interfere with a person's performance on the job. Because this may offend some individual's or client's beliefs should not be the basis for not hiring or terminating their

homosexual employee. If a client came to a company and offered to do business with a company as long as they fire all their female employees or Hispanic employees, no self-respecting businessperson would cater to such a client. Each group at some point in American history had to fight for acceptance and the same is true for homosexuals.

This position makes sense from both a “business is business” perspective and the “social responsibility of business” perspective. If a business should concern itself about making a profit then it should hire the best-qualified employees and cater to any customer who is willing to pay. To discriminate on the basis of sexual orientation means that a company is limiting both the pool of employees and its customer base which may prevent the company from maximizing its profits. This is contrary to the “business is business” perspective and such actions should be rejected on the grounds of being “unprofitable.”

If the company believes that the “social responsibility of business” perspective, then helping a group to gain acceptance in society can be considered as the part of doing business. By openly hiring homosexual employees and catering to the homosexual market, a company can use its reputation as way of convincing others to accept this group. For example, when several Fortune 50 companies began offering health care to domestic partners, many smaller companies also began offering similar benefits.

This is also a good example of Briskin’s concept of the soul in the workplace. The problem with the “don’t ask, don’t tell” is that it creates a convenient fiction for the organization while asking their homosexual employees to constrain themselves in ways that heterosexual employees are not asked to. For example, it’s perfectly acceptable to display pictures of your spouse or significant other on the desk as long as they are of opposite sex. But, homosexual employees don’t have that same privilege. Also, many

corporate executives are expected to have the traditional family that can entertain for business dinners and prospective clients. Again, homosexual employees may be excluded from these important events and this may dramatically affect their career. Every day that they are at work, they have to deny their soul in order not to disrupt the harmony of the organization because the organization determined that they are the “lepers” of the workplace and they must be covered so as not to offend the other employees and customers.

What limits should both heterosexuals and homosexuals observe when discussing their personal lives? As much as they feel comfortable discussing and others feel comfortable hearing. As with any social situation, a person should determine what is acceptable in the corporate culture and what is necessary for forming good working relationships in the workplace – as long as the rules apply equally to all parties.

It should also be understood that people have the right to say that they would rather not discuss their personal lives or the personal lives of other without being thought of as anti-gay or anti-straight. I do not think that people should be forced into liking each other and in fact they can hate each other as long as they treat each other professionally on the job. One can respect another person’s differences without having to approve of them. To take another case, its perfectly acceptable for an officemate to display religious symbols in their cubicle but they do not have the right to come over to my desk and preach to me about their beliefs.

As companies have to compete on a global scale and with many different cultures, they will have to be more tolerant and open to differences in both their employees and customers. The companies that realize this and learn to create workplaces that value

diversity will be more successful than companies that exclude certain groups based on personal prejudices.

### **MBA513 Summary Essay OIS Business Case**

During this course, I analyzed my former employer, the Office of Intergovernmental Solutions in the United States General Services Administration, and how telecommunication technologies can help it achieve its mission as a communication hub for intergovernmental management. This assignment was the culmination of the course and it demonstrates how to create a business case to influence management to implement a telecommunication project.

The key MBA learning objectives are:

- Understand the analytical techniques used in the technical evaluation and design of communication projects.
- Know how these techniques are used in problem solving, strategic planning, and re-engineering.
- Apply these analytical techniques to actual problems encountered by communication professionals.

**Office of Intergovernmental Solutions  
Intranet/Extranet Project  
Business Case**

**MBA513  
Bill Brantley  
3/30/2002**

## **Executive Summary**

The Office of Intergovernmental Solutions should create an intranet/extranet to realize the following benefits:

- Greatly reduce the amount of time and resources devoted to the publishing process;
- Increase customer feedback on OIS research; and
- Provide new sources of research from specialized news feeds on the intranet and from discussions on the extranet forums.

There will be very little cost of establishing the intranet/extranet because the hardware and software is already in place (but underutilized). The costs will be mostly in staff training but this has the added benefit of helping staff members better understand the challenges facing their customers. In the long-term, the OIS intranet/extranet will aid in fulfilling OIS's charter as an information hub for the intergovernmental community.

- **Background**

The Office of Intergovernmental Solutions (OIS) in the General Services Administration (GSA) was created by Executive Order to act as research and policy guidance office in the areas of information technology as it affects international to local governmental organizations. OIS is one department out of six in the Office of Governmentwide Policy. OIS consists of Deputy Assistant Administrator; his assistant (the Associate Administrator); five Policy Analysts and two secretarial staff members. The five Policy Analysts and the two secretaries report directly to the Associate Administrator who then reports to the Deputy Assistant Administrator. OIS produces many research publications on a continuing basis as well as hosting a website and holding conferences with other government officials. OIS also networks with major governmental organizations such as the G-8, Intergovernmental Advisory Board, National Association of State Information Resources Executives, National Governor's Association, National Association of States, etc.

The three major functions of OIS is to produce research publications, host conferences and serve as a resource hub for intergovernmental issues. Publishing and mailing research publications are just as expensive and labor-intensive as hosting conferences because OIS fails to utilize the networking technology available to the office. Like other GSA offices, OIS has the standard Microsoft Office Suite with Outlook as the email client and shares a network drive where documents are stored. The web hosting is contracted out with the website creation and maintenance being performed by OIS. There is no interactivity in

the website and all the pages are static. All networking and communication with OIS customers is by phone, email and/or fax.

Using transactional analysis, the current process of creating and distributing research publications proves to be expensive, labor-intensive and provides little customer service.

- 1) Upstream activities – When the research publication is ready for publishing, OIS had the choice of using GSA’s internal publisher or using a GSA-approved external publisher. Most of the time, OIS used the GSA internal publisher even though an external publisher may have been cheaper and quicker. The average time for delivering the draft to the publisher and then receiving the published product was around two-to-three months.
- 2) Operational activities – Once the publications are delivered, the staff would check the publications to ensure that they were correctly published. On the average, ten percent of the publication requests had to be reworked during the year. When the publications were ready for distribution, the junior staff would hold “stuffing parties” where they would create mailing labels, prepare envelopes and stuff the publications into the envelopes. These could take a day or two of the junior staff’s time and there was at least one stuffing party a month.
- 3) Downstream activities – The customers that received the publications were policymakers, persons who requested the publication and personal contacts of the staff. The lists were stored in a spreadsheet and were

updated infrequently. Approximately five to ten percent of the addresses were invalid and the publications were returned to OIS. Once the initial mailing was performed, OIS would receive additional requests for a particular publication. Usually, extra copies were on hand, but sometimes, OIS would have to initiate the printing process over again and there would be a long delay between the request and fulfilling the request.

OIS includes survey cards in the publication, but very few have are returned. Occasionally, OIS uses phone surveys but these are also inconclusive. Essentially, there is no customer feedback on the publications.

### **Intranet**

Before creating an extranet, OIS should better utilize the networking technologies that are already in place. By creating an intranet, OIS would benefit from the better document handling and research sharing that will allow staff members to produce more documents and speed up the collaboration process. Additionally the intranet can provide specialized news feeds and information resources that will allow each staff member to better scan the intergovernmental environment and aid in spotting emerging trends.

Currently, email is the most widely used tool in the office. Email is used to communicate news, ask questions, pass documents and research and coordinate office events. Email is used for these tasks, there are better applications that can make document collaboration easier and better organized, provide better research and deliver news alerts. These applications can be hosted on the intranet and customized to the OIS work procedures.

Because OIS has the existing technology and software to create an intranet, there will be very little cost in creating the intranet. Essentially, creating the intranet consists of installing Microsoft NetMeeting and configuring it to work with Microsoft Office. The specialized news feeds can consist of web pages that link to state news sites and paid research networks such as the Gartner Group. By collaborating in this manner, the staff can work simultaneously on a document and research thus completing projects faster and more efficiently.

### **Extranet**

Once an intranet is in place, the next step is to create an extranet. Creating an extranet will help in defining the mission for OIS. By adopting an extranet, OIS solves three fundamental problems:

- 1) Identification of the audience for OIS products;
- 2) Identifying what products are helping to enhance OIS' reputation; and are useful to the customer
- 3) Providing a source of new research ideas and new trends in intergovernmental issues.

As the transactional analysis of the current publishing system demonstrates, OIS spends many resources and much time on a publishing project. Additionally, once a project is finished, its useful life may be short and there is virtually no customer feedback. By establishing an extranet, OIS would dramatically save on the publishing, mailing and labor costs.

Under the extranet web-publishing model, when the final draft is created, OIS would create a Microsoft Word and PDF formats of the publication and then

link these to its website. Documents can be posted the day of their creation and the customers are responsible for downloading and printing out the documents. Documents can be updated when needed, and OIS can have visitors fill out a survey form as a prerequisite to downloading the document. Additionally, with the use of forum software, OIS can host discussion groups around a document and received immediate feedback on the publications. By providing open forums for OIS customers to discuss emerging issues and OIS research, OIS can gain invaluable feedback and research opportunities that truly serve the customer. This should aid OIS in determining what the customer wants and then defining the mission rather than defining the mission and then producing research that OIS thinks the customer will need.

By going to an extranet, OIS will have to invest little in computer hardware (much of it is in place and underutilized) while drastically cutting costs due to physically publishing its products. There will have to be increased training for the staff in web-publishing but even this has the added benefit of educating the staff about the challenges other governments face in moving to the web. To be a true leader in intergovernmental issues, OIS needs to increase its exposure on the Internet because that is where the rest of the intergovernmental community is going.

### **Conclusion**

The OIS intranet/extranet project will benefit the office by extending its reach, range and performance. First, reach will improve among the staff members especially concerning document collaboration but the greater benefit

will be greatly improved feedback among OIS and its customers. Establishing discussion forums and providing online surveys will aid OIS in determining the effectiveness and acceptance of its research.

Second, the intranet/extranet will increase range by giving OIS customers more access to policy analysts and help direct future research. Customers will provide feedback on OIS publications that will tell analysts which publications should be continued and which should be discontinued. Additionally, by monitoring the general discussion forums, analysts can determine what topics and trends are of concern to their customers.

Third, the intranet/extranet can better leverage the staff's time. By freeing the staff from menial tasks such as stuffing envelopes and preparing publications for mailing, they can spend more time on creating research publications and planning conferences. Additionally, staff responsiveness is greatly increased by having the ability to publish immediately after a publication has been finalized and to immediately publish revisions and updates to a publication.

OIS has the technology and software in place to affect these changes. All that is required is to better utilize current resources and to invest in web-publishing training. To be a true leader in intergovernmental issues, OIS needs to increase its exposure on the Internet because that is where the rest of the intergovernmental community is going.

### **MBA514 Summary Essay CIKM Business Plan – Paper Storyboard**

In MBA514, I was to create a business plan for an Internet-based business. I chose to create a competitive intelligence consulting firm. This assignment shows how I planned out the site features and how the customer would use these features. The paper storyboard shows the major parts of the site and the different user scenarios describe how the customer will use the site.

The key MBA learning objectives are:

- Understand the Internet in business by actually using the Internet to solve business-related problems.
- Understand customer-driven marketing issues and how companies can reach global customers.
- Develop case analysis and problem solving skills to assist in making financial decisions to develop new Internet-based applications.
- Understand the principles of effective customer service strategies and methods of supporting customers through an Internet service.
- Understand the critical success factors for using the Internet, including improving financial and communication goals.
- Know basic HTML coding and principles of web page development.

## MODULE 5 — PAPER STORYBOARD

### Introduction

CIKM's website is designed to advertise CIKM's services and to deliver reports to clients. It is small site (sixteen pages) that will be a mix of static and dynamic elements provided by an SQL Server database. Cold Fusion provides the interactivity for subscribing to the newsletter, client login, clients' reports listing, customized report requests and service information requests.

### Paper storyboard

#### Functionalities

- Subscribing to the CIKM Newsletter
  - User clicks on link to subscribe to CIKM newsletter (index.html)
  - User fills out request form and presses submit button (subscribe.html)
  - Form information is stored into database, email confirmation is sent to user's email address and user is informed that their information has been received (confirm.html)
  - User then clicks on link to return to Main CIKM page (confirm.html)
- Client's Login
  - User clicks on link to client's login (index.html)
  - User fills out information on login form and clicks on submit button (login.html)
  - If the user login is successful, the client is sent to their dynamically generated page where a listing of their custom reports are displayed (sub.html)
- Client's Reports Listing and Viewing
  - Client clicks on report link in the listing (sub.html)
  - If report is in PDF format, client views report using Acrobat plug-in (customized reports directory)
  - If the report is a webpage, client views report in browser (customized reports directory)
- Free Reports Listing and Viewing
  - User clicks on link to Free Reports listing (index.html)
  - User clicks on report link in the listing (free.html)
  - If report is in PDF format, User views report using Acrobat plug-in (free reports directory)
  - If the report is a webpage, user views report in browser (free reports directory)
- Customized Report Requests
  - Client clicks link to customized request form (sub.html)
  - Client can click on predefined custom reports or on a new custom report (request.html)

- If client clicks on predefined custom report, they are sent to predefined custom report form (predefined.html)
  - Client fills out form and submits request (predefined.html)
  - Form information is recorded in database, CIKM is notified of new request via email and client is informed that their request has been recorded (preconfirm.html)
- If client clicks on new custom report, they are sent to the new custom report form (custom.html)
  - Client fills out form and submits request (customer.html)
  - Form information is recorded in database, CIKM is notified of new request via email and client is informed that their request has been recorded (cusconfirm.html)
- Services Information Request
  - User clicks on Information Request form link (services.html)
  - User fills out form and submits request (info.html)
  - Form information is recorded in database, CIKM is notified of new request via email and User is informed that their request has been recorded (infoconfirm.html)

**Site structure**

**CIKM Website Paper Storyboard**

**MBA571 Summary Essay**  
**Brantley Research Initiation Phase Project Plan**

At the end of MBA571, I was to create a project plan that demonstrated all the elements of project planning discussed in the course. I chose this assignment because it shows my mastery of developing a project concept, determining project deliverables and creating a project budget.

The key MBA learning objectives are:

- Develop a plan that guarantees that all of the various elements of a project are properly coordinated.
- Plan for the necessary resources, accurately estimate cost, allocate the budget to specific work items, and control changes in the project budget.

# **Brantley Research Initiation Phase Project Plan**

***MBA 571***

**Application 7.1**

**Bill Brantley**

### **Project Summary**

Brantley Research will be a management-consulting firm that I hope to establish by December of 2001. The firm will offer information technology consulting in knowledge management (KM) and business intelligence/competitive intelligence systems (BI/CI). Initially, the firm will offer seminars and workshops in knowledge management and business intelligence/competitive intelligence practices along with Internet website components for corporate intranets. Later on, I hope to also offer KM and BI/CI application services that businesses can incorporate into their intranets.

The purpose of this project will have seven deliverables:

1. Business plan
2. Marketing plan
3. Incorporation of Brantley Research as a Limited Liability Company (LLC)
4. Three seminars
  - a. Introduction to knowledge management
  - b. Internet-based BI/CI applications
  - c. Creating an internal BI/CI unit
5. Corporate website

There are three sets of customers for this project. I will be the primary customer (along with the being the project sponsor and team) while the secondary set of customers will be the market that my firm will service. The third set of customers will be a group of web developers and consultants that form a loose association. This group helps each other by

subcontracting services and products to each other so that we run our own solo businesses but have other consulting resources to draw on for various projects.

At the end of this project, I will have a presentation-ready business plan and marketing plan that will be detailed enough to help me gain Small Business Administration loans and bank loans. Brantley Research will be an LLC with the accounting and tax systems in place and the corporate website will be ready for launch by the Fall of 2001. Finally, I will present each of the seminars at least once during the Fall of 2001.

### **Specifications**

At the end of the project, there will be seven deliverables. Overall, the deliverables are designed to initiate the business and sustain the business for up to two years.

### **Business plan**

The business plan will be up to forty pages and contain three-years of pro forma financial statements, market analysis and a five-year timeline of projected products and services.

The plan will be written so as to aid in gaining SBA and bank loans.

### **Marketing plan**

The marketing plan will be composed of two parts: a nine-month marketing campaign and a three-year marketing campaign. The nine-month marketing plan will identify prospective customers, determine marketing channels to those customers and establish the brand identity of the firm. Given the successful completion of the nine-month

campaign, the three-year marketing plan will concentrate on expanding the brand identity from the regional market to a national market and assist in marketing the projected products and services.

### **Incorporation of Brantley Research as a Limited Liability Company (LLC)**

This will require several documents: a charter to be drawn-up and filed with the Secretary of State and County Clerk; a business license from the City and the appropriate tax documents. These documents should be complete and legally sufficient. These documents will be completed and filed by May 2001.

## **THREE SEMINARS**

### **Introduction to knowledge management**

This will be a one-day designed to introduce the audience to concept of knowledge management and make the business case for incorporating it into their businesses. The goal of the seminar is to establish myself as an expert in the field and to showcase the products and services that the firm can offer customers.

### **Internet-based BI/CI applications**

This seminar will be a two-hour seminar that will demonstrate how to create and use Internet-based applications to create webpages that scan the Internet for specific competitive information and alerts the user of market trends and other relevant information. The goal for this seminar is the same as the goal for the above seminar.

## **Creating an internal BI/CI unit**

This seminar will also be a two-hour seminar that will give the business case for creating internal BI/CI units and how companies can create their own. This seminar will also have the same goals as the first two seminars with the additional goal of determining the market for a outsourcing BI/CI services from Brantley Research.

## **Corporate website**

This will be the key marketing tool of Brantley Research and ultimately the portal for the services and products that will be offered by the firm. Therefore, it must be built in a professional manner with the flexibility to grow with the business. During the first nine months, the website will advertise the seminars, establish the brand and showcase the BI/CI Internet applications.

## **Master Schedule**

### **April 2001**

1. Draw up LLC charter
2. Determine what business licenses are needed
3. Speak to an accountant about setting up a bookkeeping system
4. Begin research for business plan

### **May 2001**

1. Finalize research for business plan
2. Begin drafting business plan

## **June 2001**

1. Finalize business plan
2. Draft marketing plan

## **July 2001**

1. Research Knowledge Management Seminar
2. Write Knowledge Management Seminar
3. Prepare supporting materials for Knowledge Management Seminar

## **August 2001**

1. Research the two BI/CI seminars
2. Write the two BI/CI Seminars
3. Prepare supporting materials

## **September 2001**

1. Initiate the short-term marketing plan
2. Practice seminars with selected potential customers
3. Design and prepare corporate website

**October 2001**

1. Develop and program corporate website

**November 2001**

1. At this point, we should have first set of seminars booked

**December 2001**

1. Review progress so far.
2. Set goals for 2002
3. Set 2002 seminar schedule.

**Procedures Guide**

Because this project is the initiation of a business and because I will be doing almost everything, there will not be a need for formalized procedure. The only area that I foresee needing formal procedures will be where I will be working with associated developers and consultants.

**Cost Controls**

This project will be paid out-of-pocket as it progresses. The only major costs are the filing fees for the LLC incorporation, payment of the accountant and hosting fees for the website. At this time, I project that the cost of the project up to December 2001 to be no more than \$350. The accountant will be the biggest expense but I can gain the services of the associated developers through trading of services.

## Cross-impact Matrix

	<b>Bill Brantley</b>	<b>Accountant</b>	<b>Associated Developers</b>
<b>Business Plan</b>	<i>X</i>		
<b>Marketing Plan</b>	<i>X</i>		
<b>LLC Documents</b>	<i>X</i>		
<b>Bookkeeping System</b>	<i>X</i>	<i>X</i>	
<b>Seminars</b>	<i>X</i>		
<b>Corporate Website</b>	<i>X</i>		<i>X</i>

**Management Plan**

Every two weeks, the project deliverables schedule will be reviewed to determine if the deliverables are being created on schedule. In the case that they are not, I will determine what deliverables need to be put on hold and which are most critical. The following is the list of deliverables with the most critical to the least critical listed in order. This list will be used as a guide to determine what deliverables take precedence.

1. LLC Documents
2. Bookkeeping System
3. Business Plan
4. Marketing Plan
5. Knowledge Management Seminar
6. BI/CI Seminars
7. Corporate Website

**MBA572 Summary Essay**  
**CI/KM Technologies Business Initial Business Formation Project**

In MBA572, I expanded upon the business plan I used in MBA571 by developing a scope management plan, creating a work breakdown schedule and establishing quality management criteria. This assignment demonstrates my mastery of key project management topics such as scope management and developing realistic project timelines.

The key MBA learning objectives are:

- Clearly identify the scope of a project.
- Develop a realistic project time line.
- Estimate the costs of the resources needed to complete the project.
- Establish criteria for periodically evaluating the quality of work in progress.

# **CI/KM Technologies Initial Business Formation Project**

***Bill Brantley***

Project Manager  
MBA 572  
Application 8.1

**Project Name: CI/KM Business Initiation  
Bill Brantley**

**Project Manager:**

**Project Tracking Number:** 2001-A001

**Project Date:** May 1, 2001

**Project Justification:** CI/KM Technologies will be a management consulting firm specializing in competitive intelligence and knowledge management issues primarily in the emerging field of E-Government. The specific purpose of this project is to create the necessary legal and business documents to establish CI/KM Technologies as an LLC and begin business operations.

**Overview of Deliverables:** By December of 2001, the project team will create five deliverables:

1. Business Plan
2. Marketing Plan
3. Legal Filings for LLC
4. CI/KM Technologies Corporate Website
5. Establishment of the Center for Intergovernmental Excellence

**Project Objectives and Success Criteria:**

<b>Deliverable</b>	<b>When</b>	<b>Cost</b>	<b>Quality</b>
Business Plan	<b>End of July</b>	\$300	Sufficiently detailed to obtain financing
Marketing Plan	End of August	\$300	Obtain at least two clients by December
LLC Legal Documents	End of May	\$1,500	Conforms to legal standards
CI/KM Corporate Website	End of August	\$3,000	Good design/Establishes brand identity
Center for Intergovernmental Excellence	End of June	\$1,500	Basis for Research Network

**Scope Management:** Careful attention will be paid to both the cost and schedule requirements for each deliverable. Weekly status reports will be required for each deliverable and budgets will be tracked weekly.

When a deliverable appears to be in danger of slipping its schedule or going over budget, the Project manager will investigate the reasons for the slippage. In cases where the schedule slippage is no more than seven days or the budget overrun is no more than 10%, the Project Manager may approve any justified schedule slippage and/or budget increase. In all other cases, penalties may be assessed against the contractor responsible for the deviation.

For the LLC deliverable and corporate website, substitute contractors will be placed on standby in case it appears that the original contractors may have trouble fulfilling their delivery schedule within the budget.

### **Project Stakeholders and Their Roles:**

<b>Stakeholders</b>	<b>Role</b>	<b>Responsibilities</b>
<b>President/CEO of CI/KM</b>	Manages CI/KM	Ensures that CI/KM provides quality service to CI/KM customers; Ensures that CI/KM is profitable
President of Center of Intergovernmental Excellence (CIE)	Manages CIE	Establishes CIE as a respected research and advocacy organization
CI/KM Customers	Accepts Services of CI/KM	Provides quality feedback on CI/KM services
CIE Members	Advocacy; Research Contribution	Provides advocacy in their communities and original research ideas and products

### **Key Assumptions:**

1. Enough governments and businesses are interested in Knowledge Management and see the need for KM consulting services.
2. Knowledge Management doesn't fall out of favor due to poor implementation and hype (example: Reengineering).
3. CI/KM can develop a profitable set of proprietary consulting tools.
4. CIE can obtain the necessary grant funding.
5. CIE gains a sustaining number of memberships.

### **Work Breakdown Structure**

1. Business Plan
  - 1.1 Write Executive Summary
  - 1.2 Write Management Team Section
  - 1.3 Write Competitive Analysis Section
  - 1.4 Write Products/Services Section
  - 1.5 Write Financial Analysis Section
  - 1.6 Write Market Analysis Section
2. Marketing Plan
  - 2.1 List and analyze competitors
  - 2.2 Survey Local, Regional and National Market
  - 2.3 Determine primary customers
  - 2.4 Create marketing schedule
  - 2.5 Draft marketing materials
3. Legal Filings for LLC
  - 3.1 Review State Laws for LLC
  - 3.2 Find pertinent LLC forms
  - 3.3 File completed LLC forms

**Work Breakdown Structure (continued)**

4. CI/KM Technologies Corporate Website
  - 4.1 Design website
    - 4.1.1 Content
    - 4.1.2 Images
    - 4.1.3 Programs
  - 4.2 Find web host
    - 4.2.1 Determine site requirements
    - 4.2.2 Research web hosts
    - 4.2.3 Purchase hosting from selected web host
  - 4.3 Develop and program websites
    - 4.3.1 Author webpages
    - 4.3.2 Create programs
    - 4.3.3 Upload and test files
  - 4.4 Market Website
    - 4.4.1 Announce on relevant email lists
    - 4.4.2 Send out online press releases
  - 4.5 Maintain website
    - 4.5.1 Continually refresh content
    - 4.5.2 Create maintenance plan
    - 4.5.3 Implement maintenance plan
5. Establishment of the Center for Intergovernmental Excellence
  - 5.1 Write Mission Statement
  - 5.2 Create Bylaws
  - 5.3 File for non-profit status
  - 5.4 File legal papers to obtain non-profit tax status
  - 5.5 Create website for CIE
  - 5.6 Recruit Board of Directors from Reinvention community
  - 5.7 Plan first online conference

***Schedule - Cost Estimates - Project Baseline***

These sections are in the attached Project plan.

**Key Staff**

For the initial business formation, the only key person is the founder and President of CI/KM Technologies. Even so, after the initial business formation, it will be necessary to add staff as the business grows. Therefore a staffing plan will be developed after the completion of this project to ensure that CI/KM is adequately staffed with the necessary skill sets needed to grow the business into profitability.

**Quality Management Standards**

The outcome of this project is the establishment and ability to run and grow CI/KM Technologies and Center for Intergovernmental Excellence for the next two to three years. To accomplish that goal, the following quality standards must be met:

1. **Business Plan** – Conform to accepted standards of business plan submissions and detailed enough to gain Small Business Administration financing.
2. **Marketing Plan** – Establish brand identity and gain at least three clients for CI/KM Technologies.
3. **LLC/Nonprofit Legal Filings** – Conforms to local, state and federal laws and regulations.
4. **Websites** – Establish brand identity and serves as basis for Center for Intergovernmental Excellence’s research network.
5. **Research Network** – At least three members from the intergovernmental community to sit on Advisory Committee and at least one appearance at an intergovernmental conference.

**MBA573 Summary Essay**  
**CI/KM Technologies Risk Mitigation Plan**

In this course, I learned advanced project management concepts such as staffing a project team, developing a communications plan and creating a risk management plan. This assignment demonstrates my understanding of determining and mitigating possible project risks such as failure to create deliverables or loss of funding.

The key MBA learning objective is:

- Evaluate and manage necessary risks associated with the project.

MBA 573  
Application 6.1  
Bill Brantley

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## **CI/KM Technologies Risk Mitigation Plan**

### **Overview**

Using the Risk Assessment Matrix, I identified the major risks to the project and determined the likelihood of occurrence and impact on the project. This plan discusses each of the major risks and proposed mitigation actions.

### **Risk Mitigation**

1. *Low or nonexistent cash flow (All the money is coming from the project manager's personal account)*

Because I am funding this project from my personal funds, events such as a loss of my job or the need for emergency funds will force me to stop funding the project. Therefore, I need to set up alternate means of financing the project such as setting aside a savings fund for the project, taking out a loan for the project or having someone else invest in the project. Even though this effect is unlikely, the impact will cause the project to fail. Thus, I will take immediate steps to find alternate financing.

2. *Non-existent Market*

The recent slowdown of tech spending and the decline of the dotcom market show that most companies are wary of investing more into information technology. Additionally, knowledge management is still a young discipline and can fall out of favor as reengineering did. Therefore, I will conduct due diligence to determine what companies can afford to pay and **will** pay for knowledge management services. Additionally, I will also explore other ways of offering my services that will provide immediate to short-term payoffs so as to demonstrate value to potential clients. Finally, if there is still no market, I will determine a salvage plan that will allow me to utilize my resources and skills in a different area.

3. *Insufficient Knowledge/Skills*

This is a more common risk in IT fields especially among consultants who are too busy on assignments to learn new skills. One method of mitigation is to join relevant professional organizations to keep up with industry trends and new practices. A second method is use a "tech-mentor." This is a collection of websites, discussion lists and a network of fellow professionals that I will monitor to learn new skills and practices.

4. *Legal Documents Incorrectly Drafted or Filed / Tax Documents Incorrectly Drafted or Filed*

This unlikely event can be prevented by choosing carefully in the first place. Even so, it is easy to mitigate such an event. First, before approving and filing the forms, I will get a second opinion on the documents. Second, defects in filing can be fixed by filing amended documents.

5. *Failed launching of website (either corporate, CIEs or both)*

This event will cause the project to be partially completed. As with Number 4, I can prevent this by choosing the right developer and hosting services and having a backup developer and hosting service. It is also important to keep regular tabs on the progress of the developers and hosting services. In the case of a total failure to finish the site and/or launch it, another developer and hosting service will be used to relaunch the site.

6. *Center for Intergovernmental Excellence network never forms\_*

A major component of the project is the Center for Intergovernmental Excellence. The network that will be formed from it will aid in finding new customers and marketing CI/KM. But in the event that the network never forms, the Center can still serve as an internal think tank. Essentially, if the network doesn't form in the time specified, resources should be conserved by not pursuing network building activities.

RISK FACTOR	RISK RANK	RISK CONSEQUENCE	RISK CONTRIBUTORS	MITIGATION & CONTINGENCIES
Low or nonexistent cash flow (All the money is coming from the project manager's personal account)	Unlikely	Catastrophic	<ol style="list-style-type: none"> <li>1. Loss of Job</li> <li>2. Personal Emergency</li> <li>3. Better Investment</li> </ol>	<ul style="list-style-type: none"> <li>• Savings Fund</li> <li>• Due Diligence</li> </ul>
Non-existent Market	Unlikely	Catastrophic	<ol style="list-style-type: none"> <li>1. Low Tech Spending</li> <li>2. Knowledge Management falls out of favor</li> <li>3. High Barriers to Market Entry</li> </ol>	<ul style="list-style-type: none"> <li>• Wait it out</li> <li>• Recast the perception of services</li> <li>• Bowling Alley Strategy</li> </ul>
Insufficient Knowledge/Skills	Moderate	Major	<ol style="list-style-type: none"> <li>1. Technology rapidly changing</li> <li>2. Not enough time to retrain myself</li> </ol>	<ol style="list-style-type: none"> <li>1. Join industry group</li> <li>2. Hire a tech-mentor</li> </ol>
Legal Documents Incorrectly Drafted or Filed	Unlikely	Major	<ol style="list-style-type: none"> <li>1. Attorney malpractice</li> <li>2. Defect in filing</li> </ol>	<ol style="list-style-type: none"> <li>1. Review final draft</li> <li>2. Have another attorney give second opinion</li> </ol>
Tax Documents Incorrectly Drafted or Filed	Unlikely	Major	<ol style="list-style-type: none"> <li>1. Accountant Malpractice</li> <li>1. Defect in filing</li> </ol>	<ol style="list-style-type: none"> <li>1. Review final draft</li> <li>2. Have another attorney give second opinion</li> </ol>
Failed launching of website (either corporate, CIEs or both)	Unlikely	Major	<ul style="list-style-type: none"> <li>• Web Developer Negligence</li> <li>• Technical problems</li> </ul>	<ol style="list-style-type: none"> <li>1. Pick a good firm and have a backup</li> <li>2. Ensure that the hosting company is robust and ready</li> </ol>
CIE Network never forms	Unlikely	Major	<ul style="list-style-type: none"> <li>• No interest</li> <li>• Competition from similar organizations</li> </ul>	<ol style="list-style-type: none"> <li>1. Refocus mission and find a better niche</li> <li>2. Drop it</li> </ol>

### MBA574 Summary Essay

## **Using the Balanced Scorecard© To Plan Projects and Evaluate Deliverables**

After learning how to create a complete project plan based on the Project Management Institute's *Project Management Body of Knowledge*, this course demonstrates how to incorporate project planning into the overall strategic management objectives of a corporation. I chose this assignment because I created an original management tool, *The Project Impact Grid*, to determine how a set of projects will impact an organization based on the *Balanced Scorecard©* strategic planning tool.

The key MBA learning objectives are:

- Apply best practice in the area of strategic management to the development, implementation, and evaluation of a project.
- Evaluate the potential strategic impact of a proposed project.

**Using The Balanced Scorecard® To  
Plan Projects and Evaluate Deliverables**

***MBA 574***  
**Bill Brantley**  
**Application 8.1**

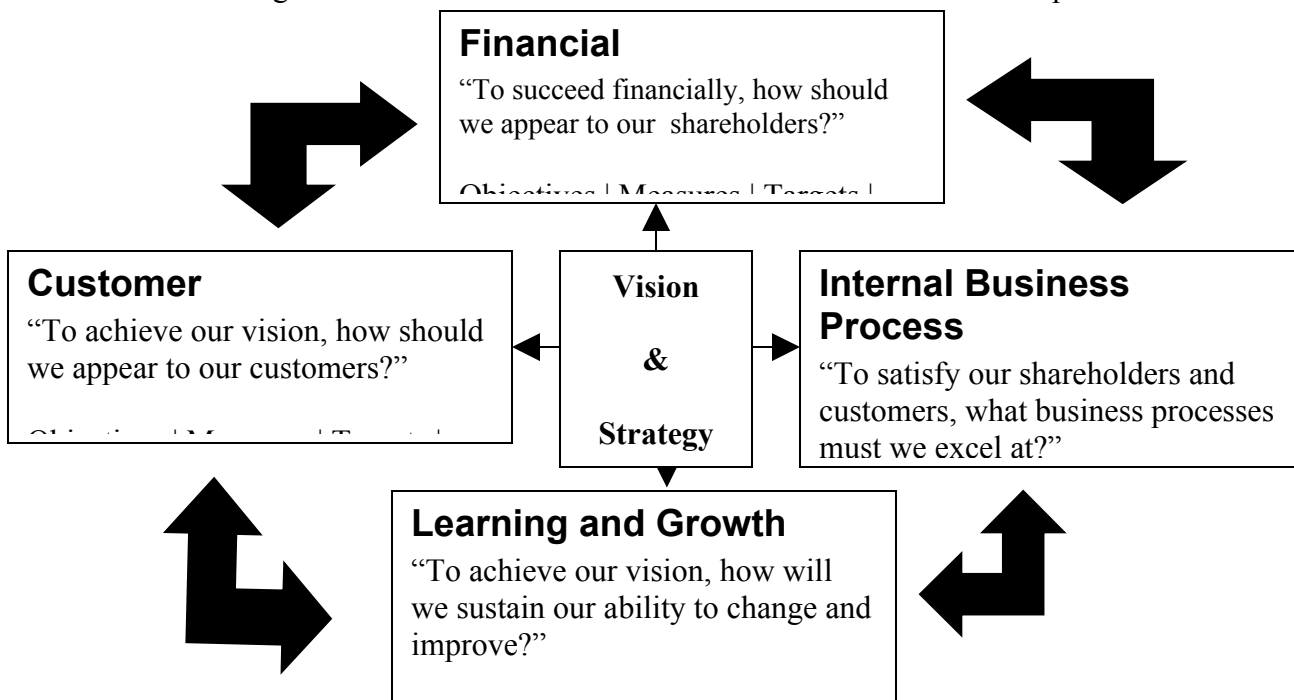
## Overview

In the past seven assignments, I have outlined how three different organizations have either successfully or unsuccessfully aligned their management of projects with the organization's strategic goals. In the successful cases, the alignment of projects with the strategic goals resulted from the special nature of the organization or the enlightened management of executive officers. In the unsuccessful cases, the managers either had poorly-designed and/or little experience in project management. Both cases could benefit from a formal process of aligning project management with the strategic goals of the organization.

When I was at the U.S. General Services Administration, I participated in several lectures on the Balanced Scorecard<sup>2</sup> system of strategic planning. Several GSA units were preparing to incorporate Balanced Scorecard method but I left agency before I could see the results of the programs. Even so, I kept up with the latest developments in the field and have just recently read **The Strategy-Focused Organization**<sup>3</sup> while I was still at XYZ.com. In fact, the project workflow that we tried to develop was based partially on the Balanced Scorecard<sup>4</sup> system. It was from those efforts, that I realized that one could use the Balanced Scorecard<sup>4</sup> system to successfully focus their project management efforts toward the strategic goals of the organization.

## The Balanced Scorecard<sup>4</sup> System

The diagram below best summarizes the Balanced Scorecard<sup>4</sup> concept:<sup>4</sup>




<sup>2</sup> All copyrights are the property of their respective owners.

<sup>3</sup> **The Strategy-Focused Organization** by Robert S. Kaplan and David P. Norton; Harvard Business School Press, 2001.

<sup>4</sup> **The Balanced Scorecard** by Robert S. Kaplan and David P. Norton, Harvard Business School Press, 1996

There are four main areas to the Balanced Scorecard<sup>®</sup>: Customers; Learning and Growth; Internal Business Process and Financial Management. In each area, the strategic planner answers the question by creating a set of initiatives, measures, targets and objectives that are the concrete manifestations of the strategic vision. In the **Strategy-Focused Organization**, the Balanced Scorecard<sup>®</sup> is expanded into the *Strategy Map*:

<i>Financial Perspective</i>	<p><b>Objectives &amp; Targets</b> ▲ <b>Measures &amp; Initiatives</b></p>
<i>Customer Perspective</i>	<p><b>Objectives &amp; Targets</b> ▲ <b>Measures &amp; Initiatives</b></p>
<i>Internal Perspective</i>	<p><b>Objectives &amp; Targets</b> ▲ <b>Measures &amp; Initiatives</b></p>
<i>Learning and Growth Perspective</i>	<p><b>Objectives &amp; Targets</b> ▲ <b>Measures &amp; Initiatives</b></p>



The main difference between the Balanced Scorecard<sup>®</sup> and the Strategy Map<sup>®</sup> is that in the Strategy Map<sup>®</sup>, each perspective serves as a foundation for the other. It is interesting to note that in both books, “project” and/or “project management” are neither discussed nor listed in the index.

**Linking the Balanced Scorecard<sup>®</sup> to Project Management:**

**The Project Impact Grid<sup>®</sup>**

Under each perspective, managers are encouraged to set objectives for their strategic business unit that utilize targets such as return-on-investment as quantifiable goals. Once these are established, managers create initiatives and measures to judge the progress of the initiatives toward the objectives/targets. It seemed to me that “initiatives” are actually projects, “objectives” are the scope of the project, “targets” are the deliverables of the project and “measures” are the schedule and risk management of the project.<sup>5</sup> In linking the Balanced Scorecard<sup>®</sup> to projects, I find it useful to devote a page to each of the four areas/perspectives. Then I list each of the initiatives, objectives, measures and targets on the left side of the page. At the top of the page, I list all the projects that pertain to the area or have a product or deliverable that falls into the area. I then determine where each project impacts an initiative, objective, target and/or measure as demonstrated by the following example.

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<sup>5</sup> The authors do not rigorously define the terms of objective, targets, initiatives and measures and these terms sometimes overlap in actual practice.

<b><i>Financial Perspective</i></b>	<b>Project X32: Modernize warehouses</b>	<b>Project X33: Reexamine company's passive investments</b>	<b>Project X34: Switch suppliers based on product packaging</b>
<b>Initiative: Switch to JIT</b>	Output of X32		Output of X34 (due to changes in product packaging)
<b>Measure: Increase ROE by 15%</b>		Output of X33	Output of X34 (due to less money in inventory)
<b>Objective: Decrease Inventory waste</b>	Output of X32		Output of X34
<b>Target: Decrease Debt by 35% in 3 years</b>		Output of X33	Output of X34 (due to less money in inventory)

As can be seen, a project has both a major and tangential impact on initiatives, measures, objectives and /or targets and across multiple perspectives. Once an organization has fully mapped out their projects based on their impact on the Balanced Scorecard<sup>®</sup> or Strategy Map<sup>®</sup>, it can determine how much of a contribution a project makes toward the organization's strategy and if there is a clash between projects in achieving parts of the strategy. This "Project Impact Grid"<sup>®6</sup> also gives the project managers and executive management a high-level perspective of how each project fits into the organization and where new projects might be needed to achieve a strategic goal.

In the case of XYZ.com, we built a departmental-level Balanced Scorecard<sup>®</sup> and then used the Project Impact Grid<sup>®</sup> to create projects that would help implement an initiative, target, objective and/or measure. We also used the grid to determine the effectiveness of two current projects imposed by the Board of Directors and determined that the projects would not have a beneficial impact of reaching our department's strategic goals. This helped in defeating the implementation of one project.<sup>7</sup> Even though, XYZ.com did not survive, one member of the department who worked with me on the workflow project, has effectively used the Project Impact Grid<sup>®</sup> in his own consulting.

## **Conclusion**

<sup>6</sup> Copyrighted by Bill Brantley 2001.

<sup>7</sup> Unfortunately, we were ordered to implement the other project but we were able to predict its impact on our goals and were able to mitigate the damage.

As the Balanced Scorecard<sup>®</sup> has helped translate strategy into concrete achievable goals, I believe that the Project Impact Grid<sup>®</sup> will help ensure the success of the Balanced Scorecard<sup>®</sup> and Strategy Map<sup>®</sup> programs. By using sound project management principles, initiatives, measures, objectives and targets are more effectively and efficiently managed and thus the organization's strategic goals stand a better chance of being realized.