



# **Business Case**

Team 3: Yushan Li, Arjun Mehra, Tran Situ, Larry Wang  
Professor Ann Majchrzak  
DSO 433: Business Process Design  
April 20th, 2017

## **Table of Contents**

I.	Executive Summary .....	2
II.	Project Description and Objectives .....	2
III.	Strategic Approach and Alignment .....	3
IV.	System Request Form .....	3
V.	Stakeholder Analysis .....	4
VI.	Feasibility Analysis (Risk Assessment) .....	5
VII.	As-Is to To-Be .....	6
VIII.	Recommendations .....	10

## I. Executive Summary

Mixalot is a patent-pending software that automates the process of connecting people based on personal preferences, which can be used for business networking events or even dating. With its ease-of-use and ongoing development, Mixalot is able to create live event atmospheres that are exciting and engaging.

Currently, Mixalot is looking to reduce the number of SaaS platforms it relies on. With their current As-Is process, operational bottlenecks occur because of redundant or ineffective processes. The company is also seeking to utilize its end-user feedback in a meaningful way, which will help them during software development.

The USC Mixalot Team has drafted multiple process-improvement strategies that will create value for the company by standardizing onboarding, implementing data analysis, and using additional features in existing SaaS solutions to improve client communication and internal workflows.

## II. Project Description and Objectives

The objective of this project is to present our client with improved processes for client communication and onboarding, as well as data analytics, by standardizing certain procedures and focusing on existing technologies rather than new SaaS solutions. The main purpose of the project is to provide external value-added to the client by finding an effective solution to streamline event administration. We will be able to measure the success of our objectives by assessing how many of them have been fully implemented and whether Mixalot is able to reduce churn rate while increasing customer acquisition.

Our business case includes the following:

- Gain a deep understanding of client's As-Is process
- Narrow down specific pain points in As-Is process
- Identify the goals and needs of key stakeholders
- Provide technology and process improvements to address stakeholder needs
- Assess the risks, benefits, and overall effectiveness of multiple options
- Provide recommendations for the client

### III. Strategic Approach and Alignment

Our solution must coincide with Mixalot's overarching business needs, while remaining flexible, scalable, and efficient in order for the business to maintain its lean and fast-paced business model. Additionally, our To-Be processes must be adaptable to multiple customer types, ranging from speed daters to professionals. Lastly, our process design and technology recommendations should not inhibit the business goals of the company, and instead provide external value-added.

### IV. System Request Form

After meeting with the client and discussing their objectives, we have created the following System Request Form:

#### Business Need

As Mixalot continues to grow, their operational processes need to be improved on various levels in order to sustain an increasing number of clients.

#### Business Requirements

- ☐ Improve and standardize onboarding process
- ☐ Utilize data analytics and reporting for clients
- ☐ Centralize and improve communication quality with clients
- ☐ Improve internal workflow efficiency

#### Business Value

Tangible value to the company will be gained by eliminating unnecessary tasks and introducing value-added activities. Mixalot will gain greater control over multiple tiers of clients and be able to improve their service based on feedback. They will also improve on metrics such as customer acquisition and retention.

#### Issues/Constraints

- ☐ Limited capital
- ☐ Limited human resources
- ☐ Flexibility and scalability
- ☐ Conversion location/style/modules

## V. Stakeholder Analysis

Name	Role	Importance	Description
USC Team 3	Project Researchers	High	Primary researchers and preparers of final deliverable
Mixalot - Rachel	CEO	High	Explained all pertinent business processes and outlined organizational goals
Mixalot - Lauren	Staff	Medium	Provided internal perspective of existing processes
Mixalot Investors	Funding	Low	Provides financial support for Mixalot's development
Event coordinators	Primary clients and users of service	High	Interfaces with Mixalot's web application, activates matching algorithm and facilitates attendee interactions
Event attendees	Secondary clients and users of service	Medium	Inputs personal traits and information into Mixalot's proprietary system in order to be matched with peers
Event venue owners	Secondary client associated with event coordinator	Low	Provides physical location for coordinators and attendees to utilize Mixalot
Dr. Ann Majchzrak	Professor and project mentor	High	Provided guidance and consulting for overall project objectives and outcomes
Sonya Sepahban	Project mentor	Medium	Provided advice from an industry perspective for overall project objectives

## VI. Feasibility Analysis (Risk Assessment)

The following three categories of feasibility analysis are intended to help better understand whether our process design changes are realistic, and whether there are pressing limitations or risks associated with them.

### Economic Feasibility

- Loss of investment in new technology is mitigated by using existing technologies
- Team size is currently low but expected to grow in the short-term

### Organizational Feasibility

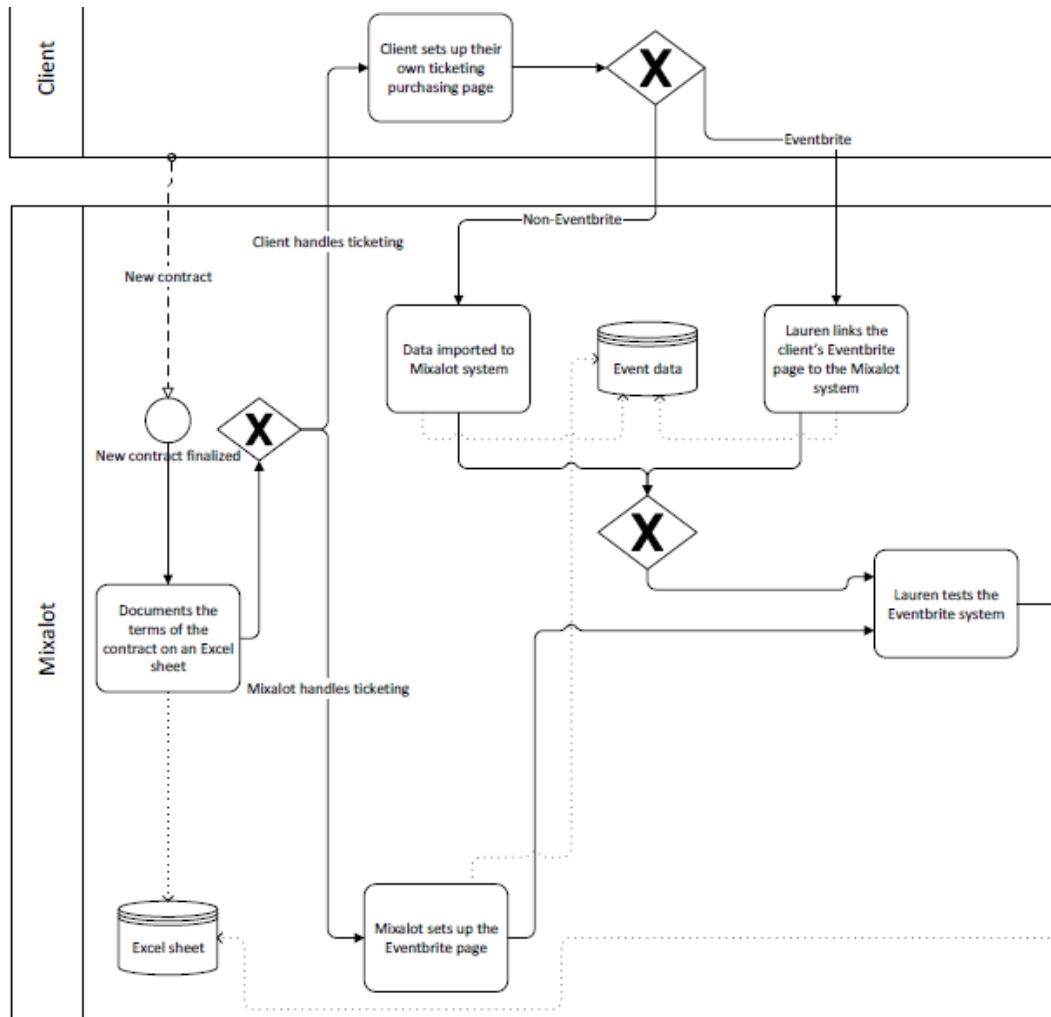
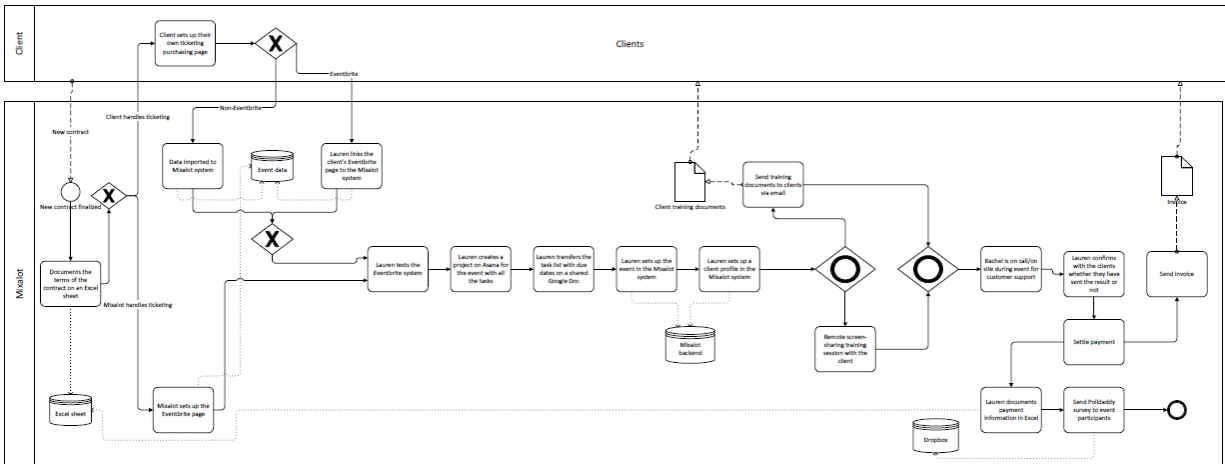
- Getting Mixalot's current staff to embrace internal changes
- Training new staff
- Assigning tasks based on functions rather than personnel
- Applying templates to differing client types

### Technical Feasibility

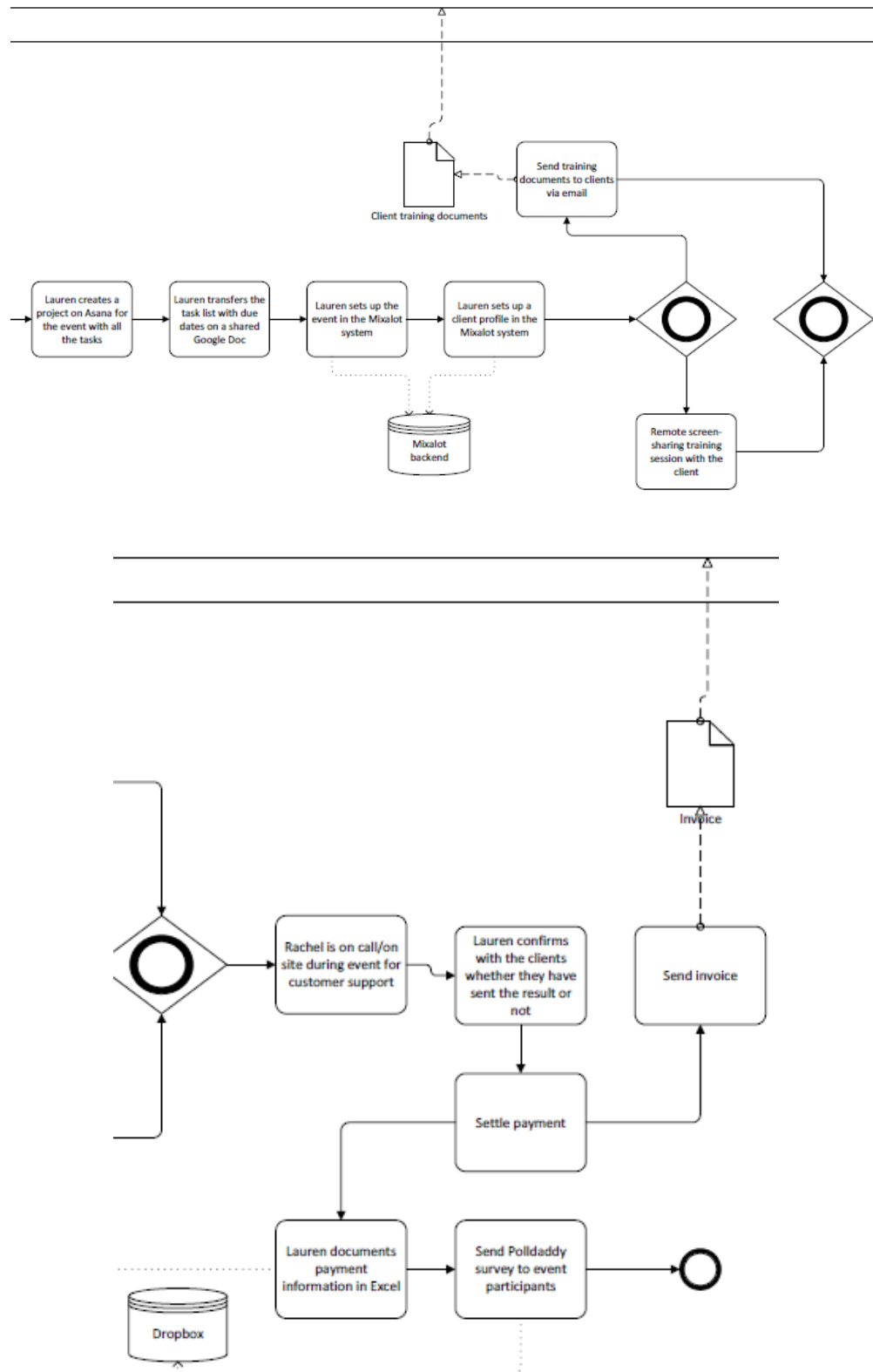
- Mixalot employees are already using both recommended platforms (Asana + HubSpot). However, not all of their features have been fully explored and utilized.

## VII. As-Is to To-Be

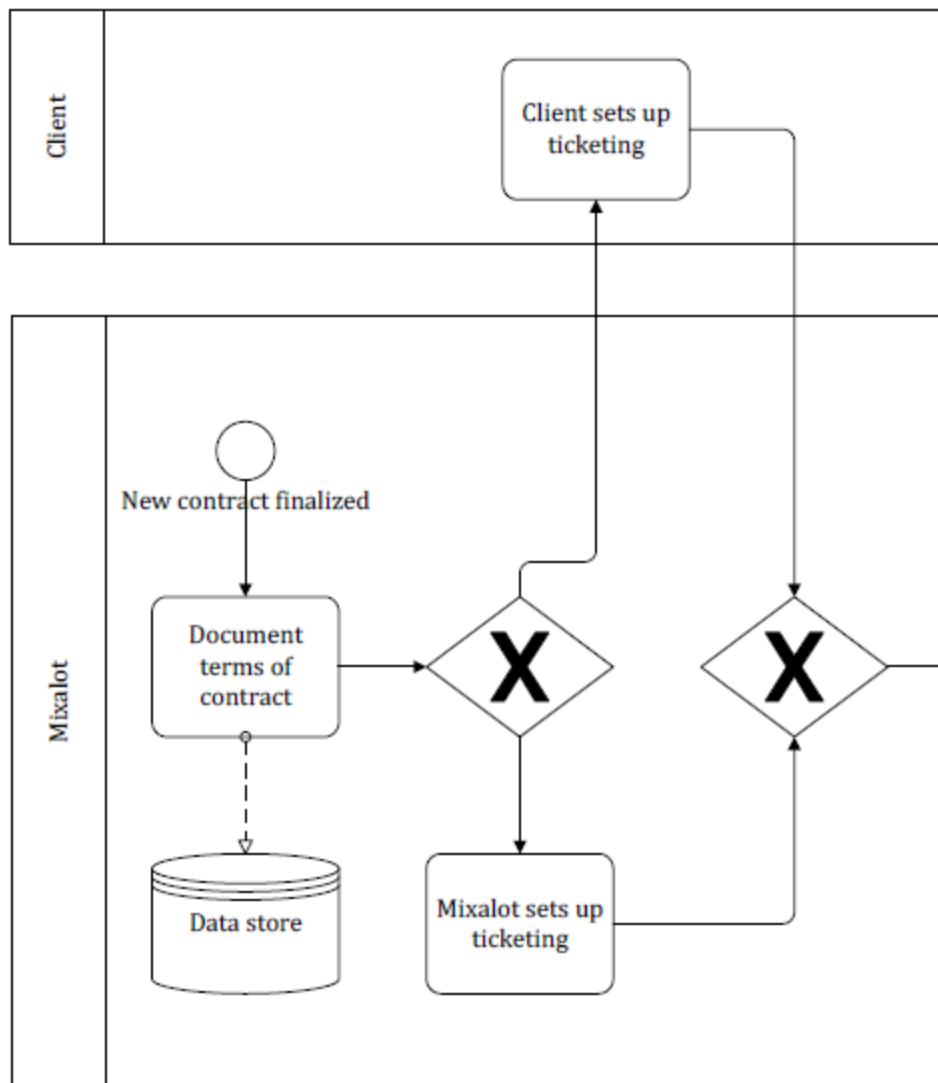
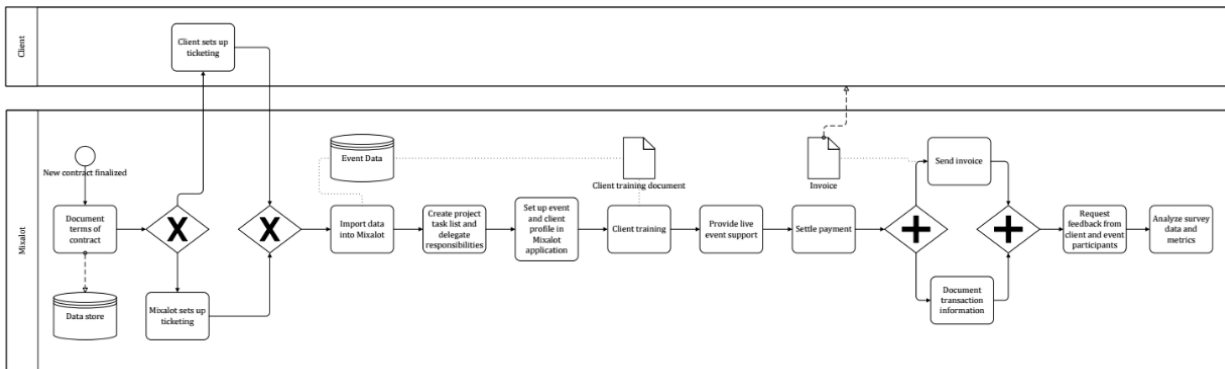
### As-Is

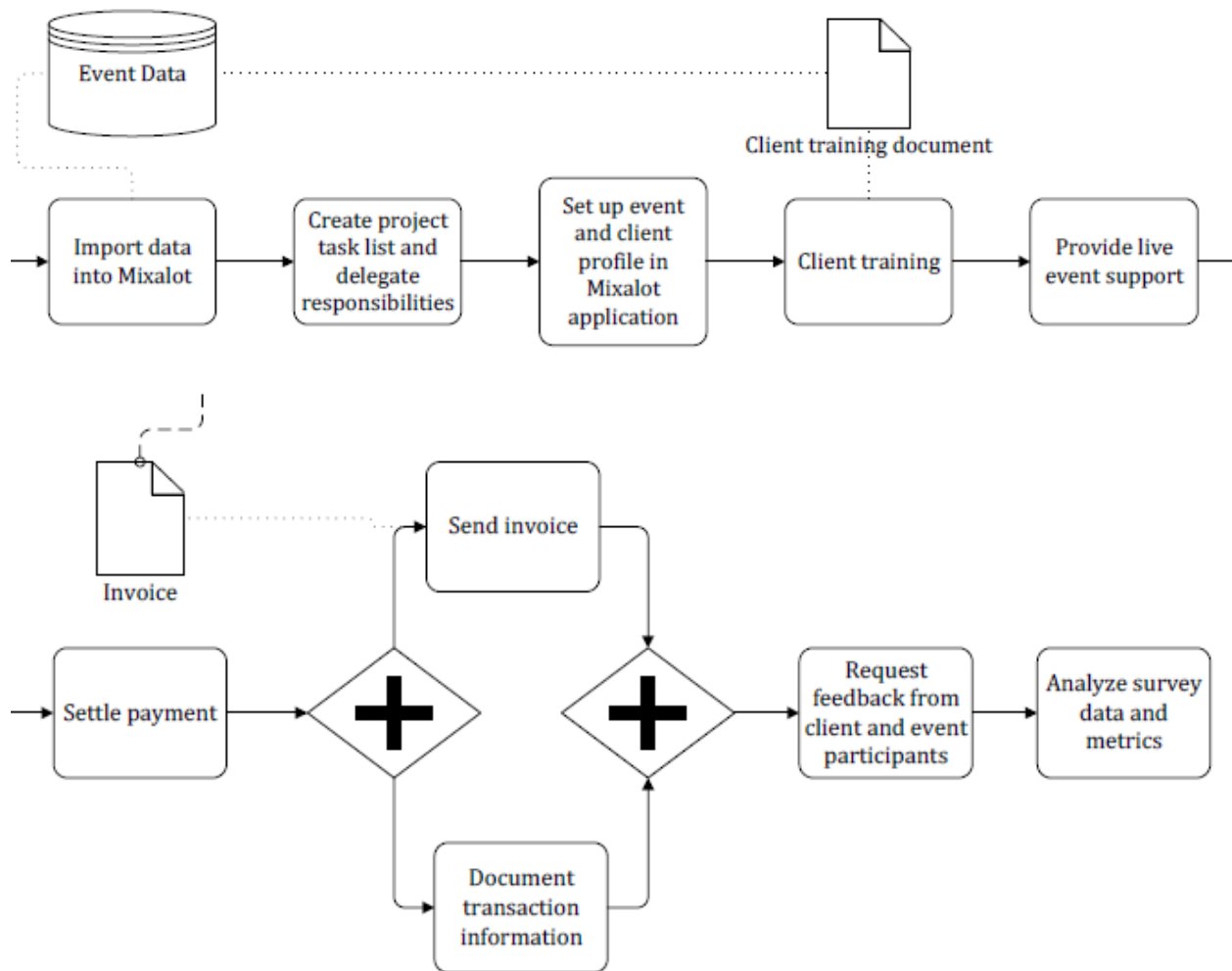


# Clients



## To-Be





### Changes (work-in-progress)

- ☐ Consolidated client training process to a single document rather than having to schedule a screen sharing session
- ☐ Added a feedback mechanism for clients to provide data for subsequent analysis
- ☐ Combined invoice generation and transaction documentation

## VIII. Recommendations (*work-in-progress*)

### **1. Template for Onboarding**

Onboarding is a great opportunity to both standardize processes and templatize information transfer in order to guarantee a repeatable process that ensures value to the client. Currently client onboarding is relatively impromptu. A well defined process greatly benefits Mixalot by guaranteeing consistency to the client. Additionally it ensures that their first interaction with Mixalot's IP (central value prop in their service) is a positive interaction with clear communication.

*[insert template here]*

We also take this opportunity to focus on the cyclical nature of business process design and our clients need to scale. It is important to ensure that quick growth and entry into new markets does not negatively affect the quality of client onboarding. This is done by adding a simple, quick, yet comprehensive survey to the onboarding packet so that 1) a clear line of communication is established right off the bat for concerns / praise, and 2) Mixalot's ability to pinpoint and resolve any future issues is vastly increased in direct response to the implementation of this onboarding sentiment collection mechanism.

### **2. Data Analytics and Reporting**

There are three main areas where we see an opportunity for Mixalot to build upon their analytics and reporting processes. Firstly, post-event feedback directly from their clients is invaluable for a small growing business. An effective process for a rapidly growing and changing company has to tie in feedback and reflection in order to guarantee a rapid response to any red flags that negatively impact client sentiment.

*[insert post-event survey for clients]*

The second area was elaborated on above. Feedback after client onboarding is a crucial area where Mixalot must ensure that clients have a firm grasp of the service provided, how to interact with the technology driving their platform, along with the features it entails and the plan of action in case of a hiccup or malfunction.

The third recommendation within analytics and reporting highlights an area where we feel Mixalot can add a lot of value to their clients without investing vast resources. Post-event attendee sentiment gathering is an ideal way for Mixalot to enrich their clients experience by directly sourcing information centered around how the event went in the eyes of the attendee's. This process can be completed through a simple post-event text message survey facilitated by Twilio, or through an email initiated online survey. Both potential processes have been drawn out in detail below:

*[to-be for both email and twillio]*

### **3. Improve Client Communication (HubSpot)**

Centralizing client communication is an effective way to ensure that nothing slips through the cracks. Having a one stop shop for communicating with clients helps both the client through a consistent touch point for communication and helps Mixalot to keep track of client management related issues as they scale quickly to accommodate more business. Communication for contract, onboarding, support, feedback, and adding new events for existing customers will all be facilitated through the CRM service that has been deemed a best fit for our proposed changes to process design.

*[build to-be]*

*[pros and cons of HubSpot]*

*[contract template]*

### **4. SaaS for Internal Workflow (Asana)**

One of the main issues facing Mixalot was a decentralization of event administrative based tools. Work was spread across 6 different tools and 3 or 4 different databases each of which played its own important role. This siloed system of operation increased the complexity of workflow, increased the possibility for miscommunication and misunderstandings, decreased the efficiency of staff, inhibited Mixalot's ability to scale under current process design, and ultimately takes away resources (time, people) from value added tasks and ties them up in administrative areas.

*[pros and cons of asana vs. trello vs. CRM (salesforce)]*

*[to-be process]*

*[value added]*

*[template of 1) new client workflow & 2) returning client workflow]*

*[integration into calendars and utilizing notifications]*

*[dropbox integration → database]*