

# ITERA 2012 CASE STUDY

## The ITERA Technology Group – Business Plan

Revised 8/10/2011

### **Problem Statement:**

You and a group of classmates have decided to leverage your knowledge and experience with telecommunications to create a start-up company tentatively named ITERA Technology Group. The purpose of your company is to help small businesses get started and become successful. Your company will do this by providing essential voice and data services ubiquitously at affordable prices.

The initial goal for your company is to serve 8-10 small (1-10 employees) businesses. For purposes of the case study, assume that your initial target market will be small medical offices and independent insurance agents located in the Charlotte, NC metropolitan area. Your client companies may include a combination of commercial and home offices. Eventually, your solution should be scalable to include other types of small business clients such as insurance agents, consultants, retail stores, medical offices, and similarly sized businesses.

Your product would be a technology-based solution that provides, at a minimum, the following business technology services:

1. Voice telephone
  - a. This would include multiple lines and features similar to what is available using Centrex services from a local telco;
  - b. Options for North American and worldwide long distance voice, fax, and inbound toll-free calling;
  - c. Features that link clients' cellular phones with your voice services to create a seamless communications environment
2. Data services
  - a. Cloud-based services to include word processing, spreadsheet, database, e-mail, video conferencing, and other services that you feel would be valuable to your proposed clients;
  - b. Secure backup and storage for data on client-owned PCs and handheld devices;
3. Support
  - a. Simple 'Help Desk' style support available on-line and via phone access
  - b. Disaster backup capabilities for all of your services in the event they are unavailable
4. Other features and services – This is your team's opportunity to differentiate your solution from 'the pack' by offering unique features and services such as online videoconferencing at costs that would provide your clients with competitive advantages at affordable costs.

Your solution must be replicable to allow it to be scalable and redeployed at other locations throughout the United States and eventually globally. It must comply with all legal regulations.

Your solution will be presented to a potential group of investors who are prepared to invest up to \$250,000 in your startup, exclusive of salaries for you and up to 2 additional members of your team. The salaries of you and your two team members for the first year will be your contribution to the new company. This capital investment is expected to fund all start-up related expenses and costs such as

purchasing equipment, marketing your solution and signing up business owners. There is no requirement to pay interest or to repay this initial capital infusion. The investors require that you NOT use additional credit or investors to supplement their capital and your labor contributions. After one year, your solution MUST generate sufficient revenue to cover operational costs and salaries.

### **Deliverables:**

The potential investors require a written proposal (see detailed formatting and submission requirements below). The potential investors have at least a businessperson's understanding of telecommunications which implies that you must provide a moderate level of explanation for technical issues and topics. Some may have more detailed telecommunications experience, but you cannot count on that. Your written proposal must include the following:

1. A detailed list and functional description of the services and functions included with your solution;
2. One or more scenarios (use-cases) that describe how a particular potential business would use your solution to conduct business more efficiently and effectively;
3. Any technical requirements that potential customers would have to meet to use your system;
4. A description of the support plan, including backup and disaster recovery plans for your solution;
5. Financial information showing a budget (revenue and expenditures) for year 1 and subsequent four years;
6. Information assuring investors that your solution is scalable and replicable.
7. An Executive Summary, not to exceed two pages in length.

### **Considerations to Assist In Preparing Your Submission**

While working to meet all the detailed requirements and specifications provided in the ITERA case study, the following generic checklist may be useful as a fundamental outline for your proposal:

- A. Clearly defined problem/need statement
- B. List of "must-have" requirements and "nice-to-have" goals
- C. A solution
  - a. Brief discussion of alternative solutions explored
  - b. Recommended technical solution
  - c. Discussion of how licensing, copyright and other legal, cultural, international or related considerations have been considered.
- D. Cost data
  - a. Total non-recurring costs (with by-item breakout)
  - b. Recurring costs – tied to the specifications of the ITERA case study
  - c. Partnership/In-Kind contributions and agreements
  - d. ROI calculation
  - e. Life cycle cost calculation
- E. Schedule
- F. Staff and support plan
- G. Executive Summary (2-3 pages)

# ITERA Case Study Preparation and Submission Instructions

Revised 8/1/2011

## **Overview**

The competition is open to ITERA member schools. For information on ITERA membership, please visit the ITERA web site, <http://www.itera.org>. Each ITERA member school may submit only ONE Case Study entry.

The competition consists of two parts, a written proposal and an oral presentation to a panel of judges. All teams must submit a written proposal using the guidelines below. A panel of judges will select the top written proposals; these teams will be invited to present their proposal in person to a panel of judges at the ITERA Conference. At least two team members must be present to participate in the oral presentation.

Teams will be permitted to ask clarification questions about the case by sending an email to [reifhl@jmu.edu](mailto:reifhl@jmu.edu) with a subject of "ITERA Case Study Competition – Clarification Question". Questions will be accepted through November 15. Responses will be posted on the ITERA web site. Due to the ambiguities associated with projects such as this Case, information necessary to provide a detailed response may be unknown or not available. We will attempt to post responses to all questions within one week of receipt. Excessive or redundant questions may not receive a timely response.

Due dates for submission of Written Proposals will be posted on the ITERA web site. Normally, presentations are due mid-February. Finalists will be notified on or about mid-March that they have been invited to compete in the oral competition. The ITERA Conference is normally held mid-April. Complimentary conference registration and lodging (double occupancy) is provided to teams invited to the oral competition.

## **Intent to Compete Notification:**

Member schools intending to submit an entry to the Case Study completion are requested to send an email to the Case Study Competition Chair at [reifhl@jmu.edu](mailto:reifhl@jmu.edu) on or before February 1 indicating their intent. While this is not required, it is requested to assist in preparing for the written proposal judging.

## **Team Composition:**

Case Study teams may consist of no more than five undergraduate or graduate students. Students must be currently enrolled for all or part of the current academic year to participate on a team. Once a team is established and a written proposal is submitted, no new members may join the team. If a member leaves the team, they will not be replaced.

## **Written Proposal Preparation:**

The written proposal must be submitted electronically via email as a MS Word document (PDF is not acceptable) with a subject heading of "ITERA 2012 Case Study" to [reifhl@jmu.edu](mailto:reifhl@jmu.edu) on or before the date listed on the ITERA website, [www.ITERA.org](http://www.ITERA.org). The MS Word document written proposal must contain a cover page that includes:

1. Submitting Institution's Name
2. Team Name and List of Team Members
3. Faculty Sponsor's Name, Email, and Telephone Contact Information

The cover page is the **ONLY** place where identifying institutional and team members' names may appear. This page will be removed electronically before submissions are sent to the judges for evaluation. The body of the proposal should contain **NO** information identifying the submitting school or team members.

The written proposal and executive summary may not exceed 20 pages in length including Appendices and should be formatted for easy reading by the judges.

Among the criteria that judges will consider as they examine each team's proposal are:

1. how well the proposal meets the minimal requirements;
2. how well the proposal incorporates relevant technologies to create a viable solution;
3. how likely it is that the proposal would be adopted by the client;
4. how complete and viable the budget is;
5. how effectively the group presented their proposal, including formatting and clarity of writing.

### **Oral Presentation:**

Only invited finalists will participate in the Oral Presentation. Judges for the oral presentation will normally be different from the judges for the Written Proposal. Each team will have 20 minutes to present their solution. Handouts are allowed. A MS Windows PC with PowerPoint and attached projection system will be available for each team's use. There are no requirements regarding how many team members must speak during the presentation. Approximately 5 minutes will be allowed at the end of the presentation for questions from the judges. The audience will not be permitted to ask questions.

Judges will have access to each team's written proposal; but teams should not make assumptions that the oral presentation judges will have read the written proposal.

Among the criteria that judges will consider as they examine each team's solution are:

1. how well the proposed solution meets the minimal requirements;
2. how well the proposed solution incorporates relevant technologies to create a viable solution;
3. how likely it is that the proposed solution would be adopted by the client;
4. how complete and viable the budget is;
5. how effectively the group presented their solution and handled questions.

**We Encourage You to Join Us at the ITERA Conference!**