CASE STUDY

Level42
The Business Case Module

OVERVIEW

The **Business Case Module** ensures that all critical aspects of the project—such as strategic alignment, costs, risks, benefits, and alternatives—are evaluated. A well-defined business case provides the justification for undertaking a project, ensuring it delivers measurable value to the organization. In this case, we are building **a business case for the $1M ERP Integration and Data Warehouse Project.**

STRATEGIC ALIGNMENT

This project aligns with the following corporate goals:

1. **Operational Efficiency:** Consolidating systems reduces duplication of work.
2. **Data-Driven Decision Making:** A unified data warehouse provides timely insights.
3. **Cost Optimization:** Decommissioning legacy systems will save maintenance costs.
4. **Regulatory Compliance:** Standardizing data ensures audit readiness. alignment with strategic goals.

PROBLEM STATEMENT

The current ERP landscape consists of three independent systems with **data silos** that make it difficult to generate consistent reports. There is significant **manual effort** involved in data reconciliation, leading to inefficiencies, reporting delays, and higher operational costs. alignment with strategic goals.

FINANCIAL ANALYSIS

Category	Cost/Benefit	Details
Initial Project Cost	$1,000,000	Includes ETL development, cloud setup and training
Annual Savings	$250,000	From decommissioning legacy systems
Payback Period	4 Years	Initial investment recouped through savings
ROI (5 Years)	30%	Based on projected cost savings and benefits

CEO's Perspective:

"As CEO, I've witnessed firsthand how Level42 transforms project management by enhancing accuracy, streamlining processes, and driving operational excellence across our organization. By leveraging Level42's AI-driven modules, we have not only improved our efficiency but also empowered our teams to focus on high-impact tasks rather than routine, manual work."

"The ERP Integration and Data Warehouse Consolidation project aims to unify data from three ERP systems—Finance, HR, and Operations—into a single cloud-based data warehouse. This project will improve data consistency, reporting accuracy, and operational efficiency, ultimately enabling better business decisions while reducing IT maintenance costs.."

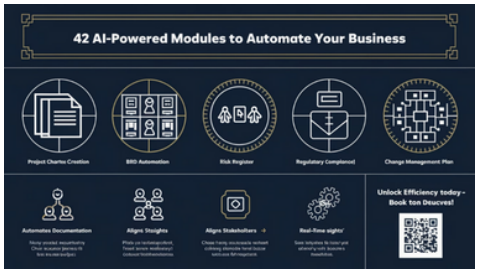
EXPECTED BENEFITS

1. Improved Reporting: Consolidated dashboards provide real-time insights.

2. Cost Savings: Decommission legacy systems and reduce IT maintenance costs.

3. Enhanced Efficiency: Reduce manual reconciliation efforts.

4. Regulatory Compliance: Standardize data for audits and compliance reporting.



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OPTIONS ANALYSIS

Option	Description	Pros	Cons
Do Nothing	Continue using three independent ERP systems	No initial cost	Ongoing inefficiencies
Implemement New ERP System	Replace all existing systems with one ERP	Modern system, integrated data	High cost, long implementation
Integrate with Data Warehouse	Integrate current systems into a central warehouse	Lower cost, quicker implementation	Requires training and data migration

RISK ASSESSMENT

Risk	Likelihood	Impact	Mitigation Strategy
Delays in Data Migration	Medium	High	Use phased approach to migration
User Resistance to Change	Medium	Medium	Conduct early training and engagement
Budget Overrun	Medium	High	Monitor expenses and use contingency reserve

RISK ASSESSMENT

The recommended option is to proceed with **integrating the three ERP systems into a data warehouse**. This option offers the most balanced approach between cost, time, and value, with an achievable payback period and long-term cost savings.

HIGHLIGHTED BENEFITS

3x - 10x Force Multiplier

Clear and Concise Communication

Professional Development

Accelerated Speed to Market