

# Solutions-Plus Consulting Firm

## Background Summary of the organization:

### Who are we?

- The Organization is Solutions Plus, founded in 1927 head quartered in New York City, New York
- Small satellite offices in 10 cities in the US, 2 offices in Canada, 3 in South America, 3 in Europe and 1 in Australia.
- Currently servicing clients in North and South Americas, Eastern Europe
- Looking to expand in Asia Pacific (China, Hong Kong, Japan)
- Small foot print in Australia, like to make it bigger
- Current revenue is 10 Billion
- Private firm owned and operated by a group of **managing partners** (25 of member)
  - 35,000 **consultants** in the field
  - 15,000 **consultants** centralized
  - 1000 **Client Relationship manager**
  - 750 **Administrative staff**
  - 500 **Directors**
  - Total employee count 52,250

### Our Mission:

Our organization is focused on the become a trusted partner with our clients, providing consulting services in a range of business disciplines across all major industries, to directly increase our clients revenue and reduce operating expenses.

### Disciplines:

Audit  
Human Capital  
Information Technology  
Financial planning  
Tax

### Industries Served:

Manufacturing  
Federal Government  
Financial Industry  
Risk Management

### Opportunities:

Expansion geographically nationally and internationally  
Expand into new disciplines such as Healthcare benefits and Petroleum and Natural Gas Exploration

### Challenges:

- Expanding Resources Geographically will require better communications channels to share information with our employees. Difficult to identify consultant's skills and assignments
- Initial client setup and billing is a very manual
- Travel booking is time consuming and requires administration resource support
- Expense submission is manual process
- Expense tracking is not well governed

## Consultants Responsibilities

- Locate Clients Information from company achieves
- Work one or more projects associated for a single Client
- Work on multiple Client projects
- Track the dates and time (hours) spent on each Client Project
- Enter Business expenses associated to client projects
- Tracking the travel bookings of Air Flights, Hotels and Rental Cars associated with each round trip

## Notes on Responsibilities and how they are currently performed

Locate Clients and project codes	Send email to ask Client Relationship Manager and ask for client code and project code
Enter Time on Client and Project	Fill out a spread sheet with a row for each day, client id, project code and hours
Review Personal Time reporting	I manually tally up the totals from in my monthly spreadsheet to see how much billable work I have completed
Client Time Submission review / approval	eMail to Client Relationship Mangers , Must have it done my end of month but try to do it more often
Track my time with clients on a calendar	I will frequently log time with each client and project on my calendar as a note so I can remember where to charge my time
Enter Business expenses	All expenses are charge to our Corporate Credit cards, which we are personally responsible to pay. We fill out a separate spread sheet to get reimbursement for the expenses, information includes a scanned copy of the monthly charge bill, and information includes a scanned copy of the monthly charge bill. This information is sent to the Client Relationship Managers who approves then sends it on to the System Administrator who enter the data into the payroll system.
Book Travel on the phone (with system administrator)	Call the system Administrators to book flights, hotels and cars. We give them our Corporate Charge Card number.

## **Assignment from Leadership:**

The leadership of Solutions-Plus would like to develop a smart phone application that will serve as a Consultant Administration Support tool for the consultant to use as help reduce the amount of time spent on administration work. This will free up additional time to generate more billable time on the client projects. As part of the Business Analysis team you have been asked to identify the key data associate with the current Client Consultants responsibilities.

## **The Deliverables:**

1. Use the Excel Template Sample to:
  - Create a Glossary of terms from the case
  - Identify all the data entities that the Consultant Administration Tool solution will need to address their responsibilities
  - For each identified entity, list the key attributes that must be collected.
  - Identify the relationships between the entities based on the responsibility
2. Use the tool of your choice (Google docs, MS Access, Word, or Sketch on Paper) to create an ER Diagram