

2019 Data Analytics Case

Written by: Barbae Marquez

Reviewed by: Davis Defontes

Background Information:

ErgonTech Int. (ETI) is a biotechnology company, based in California. ETI was established in 2000 with a focus on public research, development, and sales of manufactured supplies, laboratory instruments, services, software, and consumables. ETI has been growing substantially in recent years, their greatest growth areas have been within research and development, and sales. As ETI continues to create new products, their demand for qualified research and sales personnel will continue to increase.

Problem Statement:

The HR department has kept records of current and past employees related to their financial, emotional, and work history within the company. They have noticed their turnover rate and ETI has concerns about their attrition. They are looking to expand their production and increase employment while retaining their current employees. ETI wants to understand their employment history to increase productivity, sales, and retention. Funding has been assigned to conduct research on company attrition, in hopes to shed light on the current employee status and expectations of prospective employees. Past research has shown there are many reasons as to why attrition happens, including but not limited to environment, management, benefits, external opportunities, etc.

As the business intelligence landscape evolves rapidly, with the increasing data complexity and analytics needs in the last years, ETI seeks the engagement of a technology consulting service firm to facilitate strategy and enterprise business intelligence for HR needs.

Request for Proposals:

ErgonTech Int. is requesting a proposal from a consulting team with a background in data analytics, business intelligence visualizations, predictive analytics, and management consulting. The HR team leading this research will review all proposals and rank the consulting teams based on the strengths of their proposal and presentation of their findings. This proposal should describe ideas, strategies, and recommendations on how ETI can improve employee retention.

It is recommended that each proposal submitted contain at a minimum the following sections:

- **Background Observations** - The consultants' interpretation and understanding of ETI's problem (problem statement) and proposed assignment. Identify any special issues the proposed assignment should address as well as any potential risks and business impacts that it would cause. Additionally, please identify and address all data concerns – missing, confounding, misleading, etc.
- **Scope and Objectives** - What actions should ETI take that will result in the highest added business value? What is the associated work required to take these actions? Why is one path more desirable than the others identified?

- **Proposed Implementation Plan** - What are your actionable findings? What steps must be taken first to begin the plan? A high-level outline of the implementation plan steps (executive level) which will be completed by ETI's personnel and the consultants together to achieve the identified end results.
- **Proposed Consulting Team** - Present the consultants to be assigned, identify their roles in the project and provide information on their past experiences as it relates to completing the consulting assignment.
- **Benefits to ErgonTech Int.** - What business benefits (value) will ETI receive in exchange for the fee spent on these initial data insights, as well as the proposed follow up plan?

Oral Presentation and Interview:

The CTO and HR lead for ETI have expressed a desire to sit in on the oral presentations. As these individuals are already very busy, the consulting teams will be given 20 minutes to deliver their presentations. This presentation will be followed by 10 minutes of questions from the stakeholders directed at the consulting team. To properly understand and evaluate your proposal and team, it will be very important for the entire presentation to be complete within 20 minutes, and each member must partake in the presentation.

Proposal Submission

It is the policy of ETI to accept proposals in electronic form only (Adobe Acrobat .pdf format). Proposing consulting teams are responsible for ensuring their proposals are received by ETI's HR team by the date and time indicated below. Completed proposals shall be emailed to itcchair@calpolymissa.org and proposing consulting teams will receive an email confirming successful receipt.

Important Dates

Prospective consulting teams should be aware of the following important dates. Failure to complete submissions or attendance at these dates will result in disqualification from being considered for final ranking:

- March 16, 2019 – Proposals in electronic form due to ETI by 5:00 P.M. Pacific Time
- March 23, 2019 – Oral Presentation and Interview to ETI HR team

ErgonTech Int. is looking forward to receiving your proposal and attending your oral presentation and interview.