

# Quantifying Business Impact

## Decision Makers require it, our ROI Case Studies present it.

### Case Studies That Focus on Business Impact

In each of our ROI-focused Case Studies, we determine the business impact (financial return) the profiled customer achieved from the investment made in the solution.

In addition to a compelling customer success story, each Case Study we write and produce includes a business case where **we calculate the ROI**, as well as other financial metrics like net benefit, payback period, Net Present Value (NPV), Internal Rate of Return (IRR), Key Performance Indicators (KPIs), etc.—even when the profiled customer has not measured the gains themselves.

**The result** is a high impact Customer Case Study that can be used effectively with enterprise decision makers who need to see tangible proof points and ROI metrics when evaluating new products, services and solutions.

*“We won \$2M in new business at Exempla Healthcare due in large part to the Detroit Medical case study produced by Case Study Forum.”*

Robert Hann  
Network Storage Solutions  
HP

### ROI Drives Technology Purchases

“90% of enterprise decision makers require a financial impact assessment before making IT purchases while 70% of enterprises expect their key vendors to provide an objective financial analysis as part of the sales process”, according to Info-Tech Research Group.

With ROI being the driving force behind most purchases, enterprise decision makers need to see tangible proof of how the solution has worked; who has had proven success; what have been the quantitative benefits; where have the productivity gains and payoffs been; and what have been the lessons learned.

### Avoid Case Study Pitfalls

Case Studies often lose their intended impact because they read like advertisements, do not contain substantive detail, are not current, and fail to include quantitative ROI discussions.

Many Case Studies provide a simple qualitative look at the solution, usually through a series of anecdotal stories or loosely connected quotes by the customer.

Using in-house staff or going through PR agencies to write Case Studies may not yield the results that will help your field sales force close business. These resources often lack the probing techniques to uncover the most compelling aspect of the customer story, and do not have the financial expertise to do the technology value assessment analysis necessary in order to measure, derive and report on benchmarks like ROI, NPV, IRR and payback.

### The Best Solution

By showing the business impact—the revenue, productivity and cost savings the profiled customer achieved as a result of the investment made in the solution, our ROI-focused Case Studies offer the next level in customer *success stories* and *testimonials*.

By presenting the actual ROI, net benefits, payback period, NPV, IRR, KPIs, etc. coupled with a compelling customer success story, the business decision maker (your sales prospect) has a verified document that demonstrates your solution will deliver tangible gains.

To successfully produce these ROI Case Studies, Case Study Forum is made up of an experienced team of interviewers and facilitators, technology value assessment analysts, writers and editors:

- Our team has extensive technology experience, most with over 25 years in the IT, networking and telecommunications arena.
- Our expertise in business processes—along with a proven, structured process and rigorous methodology to uncover, measure, and quantify the solution's impact and increased contribution (value) to the business—enables us to clearly articulate the business impact in direct financial terms, accommodating for the unique characteristics of each vertical industry.
- Our production is based on a trusted, well-orchestrated interview, writing and review process that guarantees fast customer approval.

# ROI Case Studies Quantifying Business Impact

## OVERVIEW

The editorial format and document length are designed to accommodate your company's specific requirements and guidelines. Case Studies are typically 5-6 pages in length, approximately 2,000 words—this includes the main text being supported by easy-to-read summaries and callouts, charts, and illustrations. The final document is delivered either in your company's template or in the Case Study Forum's format.

The entire process, from the interview to a published Case Study, takes about 20 business days. Only 2 hours of time is needed from the customer profiled in the Case Study—that includes the 1 hour phone interview.

## CONTENT

Each case study is written from a business perspective, and details a specific customer's experience with the solution; presenting a concise, compelling, persuasive story that focuses on the business challenges, underlying business implications, how the solution worked, why it worked so well, impact, benefits, results and value.

Each case study also presents the quantitative business impact (financial benefits) the profiled customer achieved as a result of investing in the solution. Using our exclusive process and methodology, we focus on revenue enhancements, cost savings, and efficiency gains, presenting a business case that includes detailed financial metrics (ROI, net benefit, payback period, NPV, IRR, KPIs, etc.).

## QUANTIFYING THE BENEFITS

To quantify the business impact and calculate the financial metrics that appear in each case study, we first focus on the solution's direct impact on revenue, productivity, and cost savings (both IT & business savings). Then, we look at how the solution is driving value in the organization through its Contribution to Revenue (impact of application usage on the user's productivity), Cost Reduction (cost avoidance, containment, risk mitigation), and Asset Optimization (efficiency gains). For the interview, we do not expect the customer to have measured gains or benefits on their own. We simply look for their high level inputs. We will select reasonable data points from their responses and use our rigorous methodology to generate the ROI, net benefits, payback period, NPV, IRR, KPIs, etc.

### School Technology Cooperative Reaps a \$54 Million Benefit with Citrix® Solution

The Washington School Information Processing Cooperative (WSIPC) helps school districts across Washington deliver a better quality education to its children by providing the districts with cost-effective information systems. These systems support the sharing and management of fiscal, human resources, and student data. When it came time for WSIPC to deploy Skyward Pac-School Management Systems, a new Enterprise Resource Planning (ERP) solution statewide, it chose Citrix® MetaFrame XP® Presentation Server software to deliver the ERP software. The Citrix solution has enabled WSIPC to centrally deploy and manage their applications; has allowed the ERP software to be accessed via a variety of client devices, including Macintoshes and Windows-based PCs; and offers an easy management infrastructure for supporting tens of thousands of users with little to no management required on the school district's part.

**IN BRIEF**

- **Goal:** Enabling the Washington School Information Processing Cooperative (WSIPC) to provide 279 school districts in Washington State with centralized, real-time access to key school district administrative and reporting applications, while helping conserve state educational funds.
- **Solution:** Citrix® MetaFrame XP® Presentation Server software
- **Results:** Washington State gains a projected net benefit of nearly \$54 million over five years, with an internal rate of return (IRR) of 254 percent and a payback period of eight months. School districts receive stable administrative and reporting applications on a variety of client platform.

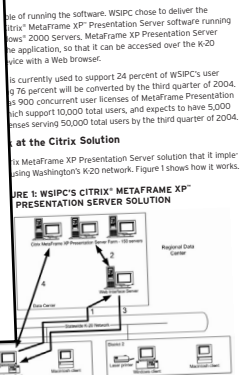
**CONTENTS**

- About WSIPC.....2
- The Challenge: Rolling Out a New ERP System Statewide.....2
- Making the Move to a Citrix® Solution.....2
- An Inside Look at the Citrix Solution.....3
- The Bottom Line for WSIPC.....3
- Business Analysis of the Solution.....4
- Looking to the Future.....4

**Objectives**

Objective	Benefits Achieved
Consolidate education funds	Nearly \$54 million in savings and benefits projected over five years due to Citrix® MetaFrame XP® Presentation Server software.
Fast and easy application deployment	Centrally deploy and manage ERP application statewide to 42,000 users. Application updates available six months faster.
Expand the use of existing corporate hardware	Application can run on different platforms, including Macintoshes, new PCs, legacy PCs, and mobile devices.
Simple, scalable management	Infrastructure allows for central management of tens of thousands of users by two IT staff directly responsible for Citrix MetaFrame XP Presentation Server.
Flexible, browser-based user interface	All users see the same Web-based interface, regardless of computing platform.
Aid in compliance with state and federal reporting regulations, such as the No Child Left Behind Act	Templates and reporting options for compliance are made available to all school districts as soon as they are published.

Page 1



### The Bottom Line for WSIPC

WSIPC's bottom line for the project: **\$53,966,000**, the ability to centrally deploy and manage key application with a small staff, quicker software updates, a more stable operating environment, and better compliance with the No Child Left Behind Act.

The Citrix implementation helped WSIPC cut costs, rapidly deploy and centrally manage the Skyward application, roll out updates immediately, and provide for a more stable operating environment. Because the software program runs centrally on 150 Citrix MetaFrame Presentation servers in a farm, it only needs to be updated on the server farm and is then instantly available statewide, delivering cost savings and ensuring that the newest version is available to school districts immediately. In fact, school districts receiving the Skyward application via Citrix software have the latest versions up-and-running a full six months before school districts that run the application locally.

The Citrix implementation also helps the school districts comply with the "No Child Left Behind" Act by making templates and reporting options for compliance available to all school districts as soon as they are published.

### Business Analysis

A detailed analysis of cumulative benefits of Citrix solution. The project and a payback period.

The \$53,966,000 net increased availability of greater flexibility in contribution to IT cost IT costs, accounts to mention accounts to a detailed, five-year of

Year	Cumulative Five-Year Benefit (\$000)
Year 1	\$582
Year 2	\$6,628
Year 3	\$20,918
Year 4	\$35,004
Year 5	\$53,966

**Payback Period for Citrix MetaFrame XP**

Year	Project Costs (\$000)	Startups	Year 1	Year 2	Year 3	Year 4	Year 5
Hardware, Software & Implementation	\$1,208	\$0	\$1,007	\$1,007	\$1,007	\$1,007	\$1,007
Staff Costs	\$665	\$665	\$665	\$665	\$665	\$665	\$665
Total	\$1,873	\$665	\$1,672	\$1,672	\$1,672	\$1,672	\$1,672

**Benefits (\$000)**

Year	Cost Savings (Equipment & Staff)	Contribution to Savings in IT Costs	Productivity Value from User Availability	Productivity Value from User Productivity	Total
Year 1	\$649	\$1,263	\$1,442	\$806	\$3,160
Year 2	\$1,089	\$2,044	\$1,871	\$4,905	\$4,905
Year 3	\$1,302	\$2,326	\$2,394	\$3,292	\$5,319
Year 4	\$462	\$4,450	\$4,819	\$4,868	\$7,589
Year 5	\$1,999	\$11,874	\$4,819	\$15,062	\$19,760

**Financial Analysis (\$000)**

Year	Net Value	Internal Rate of Return (IRR)	Payback Period (Months)
Year 1	(\$2,581)	51.834	59.792
Year 2	(\$2,258)	57.7	53.470
Year 3	\$1,659	53.240	53.240
Year 4	\$4,905	59.999	59.999
Year 5	\$19,760	53.966	53.966

**Key Performance Indicators (KPIs)**

Annual Net Value of Citrix/MetaFrame XP	Annual Net Value of Citrix/MetaFrame XP	Annual Business Value of WSIPC/ERP
\$2	\$2	\$45

**Looking to the Future**

In the near future, he says, "The issues raised by the 'No Child Left Behind' Act could readily be solved by using Citrix software as a platform. We believe that the deployment of this platform could meet nearly any challenge that may be presented from a legislative perspective."

Page 3