# Internal business case: standardise survey delivery and reporting, Larkfield Analytics

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# Internal business case: standardise survey delivery and reporting, Larkfield Analytics

**FICTIONAL ORGANISATION AND WORKED EXAMPLE.**

Larkfield Analytics Ltd and all internal facts, roles and figures in this document are fictional. This document is a worked example.

## Executive Summary

We seek the fictional board's approval for a one-time, three-month internal pilot to standardise documentation of sampling methods and create a repeatable dashboard handover for one internal survey. No client data is included.

The proposed full-scope pilot cost is **£32,500 excluding VAT**, calculated from the supplied standard rates and planning allowances. This sits within the stated internal budget range of **£30,000 to £37,000** and within the requested £37,000 budget range.

The decision is between a scoped pilot, continuing the current process, and postponing the decision. We recommend approving the scoped pilot, subject to confirmation of the proposed delivery approach, technical configuration, staffing allocation, acceptance criteria and commercial authority. The board should review the pilot at the end of month three using delivery time, completeness of method records and handover quality. No quantified savings, revenue forecasts or payback assumptions are supplied, so no improvement is claimed before measurement.

## Problem Statement

The requested pilot objective is to standardise how survey analysts document sampling methods and prepare a repeatable dashboard handover. The pilot will apply this objective to one internal survey over three months.

The brief does not establish the current process, its delivery time, the completeness of existing sampling records, the quality of present dashboard handovers, or any resulting losses or benefits. We will treat these as discovery questions rather than as established problems.

- What method-record fields are currently created, retained and reviewed for an internal survey?
- What activities and elapsed time currently comprise dashboard handover?
- Which internal users require access to the pilot dashboard and method records?
- What source system, export, database view or API will provide pilot data?
- What baseline evidence can be captured before the new process is tested?

## Proposed Solution

Subject to bid-team confirmation of delivery capability and staffing, and to board approval, we propose a scoped pilot with four controlled outputs: a written sampling and weighting method, a method-record template, a documented data dictionary and a repeatable dashboard handover pack.

Our proposed workflow would start with the documented two-week discovery approach: stakeholder interviews, a data inventory and a written data protection impact assessment for client sign-off before any personal data moves. As no client data is included in this pilot, discovery should confirm whether any personal data is present in the internal survey dataset and whether a data protection impact assessment is required for the final configuration.

- We would propose and seek approval for a sampling-method template covering survey purpose, population, sample frame, sample selection, invitation volumes, response handling, weighting approach, limitations, approvals and version control.
- We would propose a common reporting-store layout and a data dictionary retained by the organisation.
- We would propose a dashboard handover pack containing data-source definitions, refresh instructions, named-user access configuration, accessibility test record, acceptance evidence, known limitations and an operational walkthrough recording.
- We would propose fortnightly sprints, written progress reporting and risk-register review at each steering meeting.

Subject to technical validation and board approval, the proposed pilot design is a scheduled daily import from a standard export, database view or API into the reporting store. If no available interface exists, we would propose a read-only export during discovery. The proposed configuration requires confirmation that the dashboard platform supports the selected synchronisation mechanism and interval.

Subject to technical validation and approval, we propose named-user access with role-based permissions, least-privilege allocation, access provisioning and removal records, and a quarterly access review. We would propose a pre-launch test of user roles and unauthorised-access restrictions. To be confirmed: dashboard-platform support for the proposed access-control configuration and test evidence.

Subject to technical validation and approval, we propose documented backup ownership, a restore runbook, encrypted backup retention parameters and one recovery test before pilot acceptance. To be confirmed: dashboard-platform backup, retention and restore capabilities required for the proposed procedure.

Where the dashboard is delivered, it would be proposed for testing against WCAG 2.2 level AA before launch. Existing delivery evidence identifies Tomasz Wren, Dashboard Developer, as owning accessibility testing against WCAG 2.2 level AA; allocation to this pilot remains subject to bid-team confirmation.

## Options Analysis

| Option | Description | Advantages | Limitations and risks | Decision implication |
|---|---|---|---|---|
| 1. Scoped three-month pilot | Apply a standard method-record and dashboard-handover approach to one internal survey, with end-of-month-three review. | Creates observable evidence on delivery time, method-record completeness and handover quality within the stated pilot scope. Produces defined pilot artefacts for review. | Requires approval of £32,500 excluding VAT, internal participation, source-data access and acceptance criteria. No benefit is proven until measured. | Recommended, subject to the stated confirmations and approvals. |
| 2. Continue the current process | Do not introduce the proposed pilot standard during the three-month period. | Avoids pilot expenditure and delivery change during the period. | Does not generate the requested pilot evidence or a tested repeatable handover approach. Current performance is not evidenced in the brief. | Retain only if the board does not approve pilot funding or access. |
| 3. Postpone the decision | Defer approval and revisit after further definition. | Allows more time to confirm scope, systems, baseline measures and governance. | Defers the requested three-month evaluation and leaves the pilot scope untested. No timetable after postponement is supplied. | Use if the open technical, commercial or staffing items cannot be resolved before approval. |

## Cost-Benefit Analysis

The full-scope cost below uses the supplied planning allowances of 15 Senior Survey Analyst days and 12 Lead Data Engineer days, together with four director days and three months of dashboard-platform licence. All rates are fixed for the whole term of a contract, including any extension. Rates exclude VAT.

| Line item | Rate-times-quantity basis | Amount excluding VAT |
|---|---|---|
| Engagement Director | £1,150 per day × 4 days | £4,600 |
| Senior Survey Analyst | £820 per day × 15 days | £12,300 |
| Lead Data Engineer | £950 per day × 12 days | £11,400 |
| Dashboard-platform hosting and licence | £1,400 per month × 3 months | £4,200 |
| **Full-scope pilot total** | **All listed line items** | **£32,500 excluding VAT** |

The dashboard-platform licence supports up to 40 named users. Survey fielding is priced at £1,900 per 1,000 invitations, but no invitation quantity is supplied and it is not included in the full-scope total. Paper-comment-card digitisation is priced at £0.85 per card, but no card volume is supplied and it is not included in the full-scope total.

Expenses are not charged unless agreed in writing in advance; agreed travel and out-of-pocket costs are charged at cost. To be confirmed: VAT applicability and amount. To be confirmed: whether survey fielding, paper-comment-card digitisation, travel or other out-of-pocket costs are required for the pilot.

**ROI calculation:** ROI = (quantified pilot benefits less pilot cost) ÷ pilot cost. The pilot cost is £32,500 excluding VAT. No quantified savings, revenue forecasts, payback assumptions or quantified benefits are supplied; therefore a numerical ROI cannot be calculated and will not be claimed.

The pilot's potential value is a hypothesis to test through the specified measures, not a forecast. The full-scope total is within the £30,000 to £37,000 internal budget range; final budget compliance remains subject to confirmation of excluded and unresolved costs.

## Implementation Plan

The following schedule is a proposed planning assumption requiring approval. It fits the supplied three-month pilot duration and uses a 12-week planning period because no kickoff date is supplied. Calendar dates cannot be stated until kickoff is agreed.

| Planning period | Proposed activity and deliverable | Responsible role | Predecessor or dependency | Observable acceptance criterion |
|---|---|---|---|---|
| Weeks 1-2 | Discovery; stakeholder interviews, data inventory, baseline-measure plan and proposed data protection impact assessment. Deliverable: discovery and approval pack. | Engagement Director; Lead Data Engineer; Senior Survey Analyst | Board approval; nominated internal approver; access to relevant process and data information. | Written approval or material-issues list from the nominated approver. |
| Weeks 3-5 | Define the sampling-method template, data dictionary and common reporting-store layout. Deliverable: controlled documentation set. | Senior Survey Analyst; Lead Data Engineer | Approved discovery outputs and source-data definition. | Method-record fields, data definitions and owners are documented and demonstrated. |
| Weeks 4-8 | Configure proposed data connection, reporting store, dashboard and access controls. Deliverable: pilot dashboard and handover draft. | Lead Data Engineer; proposed Dashboard Developer allocation | Approved technical design, source-system access and platform confirmation. | Configured pilot is demonstrated using agreed internal survey data. |
| Weeks 9-10 | Test dashboard accessibility, role access, refresh, backup-and-restore procedure and handover walkthrough. Deliverable: test and issue record. | Proposed Dashboard Developer allocation; Lead Data Engineer | Configured pilot environment. | Agreed tests are evidenced; material issues are listed for correction or accepted by the nominated approver. |
| Weeks 11-12 | Complete handover, capture measures and conduct end-of-month-three review. Deliverable: pilot review pack. | Engagement Director; Senior Survey Analyst | Completed pilot artefacts and agreed measurement method. | Board receives measured results, outstanding risks and a decision recommendation. |

We would demonstrate each deliverable to the nominated approver. Acceptance would follow written confirmation against criteria agreed in discovery, or a written list of material issues requiring correction.

## Resource Requirements

| Resource | Planning allowance or role | Proposed responsibility |
|---|---|---|
| Engagement Director | 4 days | Proposed governance, progress reporting, escalation and report sign-off. |

| Resource | Planning allowance or role | Proposed responsibility |
|---|---|---|
| Senior Survey Analyst | 15 days | Proposed sampling-method documentation, method-record template and narrative review. |
| Lead Data Engineer | 12 days | Proposed data inventory, data-connection design, reporting-store documentation and technical test support. |
| Dashboard-platform licence | 3 months; up to 40 named users | Proposed dashboard hosting and named-user access. |
| Internal nominated approver | To be confirmed | Approve discovery criteria, review demonstrations and confirm acceptance or material issues in writing. |
| Internal survey owner and data-access owner | To be confirmed | Provide process information, approved data access and baseline evidence. |

Existing role evidence identifies Imogen Farrow as Engagement Director, Dev Okonkwo as Lead Data Engineer and Sunniva Hale as Senior Survey Analyst. To be confirmed: availability and allocation of these named personnel for the pilot. To be confirmed: Dashboard Developer allocation for dashboard build and accessibility testing.

Subject to approval, we propose two half-day training sessions for service managers, a recorded dashboard walkthrough and an end-of-pilot review. The established training approach also includes a 90-minute annual elected-member briefing and a second service-manager session at month six; these activities do not fit the supplied three-month pilot period unless separately approved.

## Risk Assessment

| Risk | Potential effect | Proposed control | Owner | Residual position |
|---|---|---|---|---|
| Unclear baseline measures | End-of-pilot results cannot be compared consistently. | Agree measure definitions, evidence sources and baseline capture during discovery. | Senior Survey Analyst; internal survey owner | Open until discovery approval. |
| Delayed source-data access or unclear interface | Configuration and testing may be delayed. | Confirm export, database-view or API route in discovery; propose a read-only export where no interface exists. | Lead Data Engineer; internal data-access owner | Open until access is granted and tested. |
| Personal-data handling is not fully defined | Data movement could proceed without agreed safeguards. | Complete and obtain sign-off for the written data protection impact assessment before personal data moves. | Lead Data Engineer; nominated approver | Controlled through approval gate. |
| Access-control or restore capability is unsupported by the selected platform | Proposed security and recovery tests cannot be completed as designed. | Validate platform support before configuration; document any agreed alternative. | Lead Data Engineer | To be confirmed. |
| Method records are incomplete or inconsistently adopted | Pilot cannot demonstrate a repeatable documentation approach. | Agree mandatory fields, version control and review criteria before use. | Senior Survey Analyst; internal survey owner | Measured at review. |

| Risk | Potential effect | Proposed control | Owner | Residual position |
|---|---|---|---|---|
| Named personnel are unavailable | Delivery schedule or quality controls may be affected. | Confirm staffing allocation before mobilisation and maintain the named escalation route. | Engagement Director | To be confirmed. |

The documented escalation route is Imogen Farrow, then Larkfield's managing director. Subject to agreement, we propose pilot support coverage during UK business hours, Monday to Friday; this is an unapproved proposal, not a supplied service level. We propose priority definitions of P1 for loss of access affecting all pilot users, P2 for material dashboard-function loss affecting one or more users, P3 for non-material defects and P4 for information requests. We propose acknowledgement targets of four business hours for P1, one business day for P2, two business days for P3 and three business days for P4, with daily business-day updates for P1 and P2 until closure. To be confirmed: staffing, contacts and authority to commit to this proposed support model, response targets and support period.

The documented information-security approach hosts client data in a UK data centre, encrypted at rest and in transit, with named-user access and quarterly access review. It states notification of a confirmed personal-data breach within 24 hours, identifying what happened, affected data and actions underway. Applicability to the final internal pilot configuration remains subject to confirmation of the data, platform and contractual arrangement.

## Success Metrics

These are proposed pilot measures requiring board approval. They evaluate the requested pilot objective without claiming improvement before measurement.

| Measure | Proposed definition | Evidence | Review point |
|---|---|---|---|
| Delivery time | Elapsed working days from agreed survey-data availability to accepted dashboard handover. | Project plan, dated deliverables and written acceptance record. | Baseline in discovery; measured at end of month three. |
| Completeness of method records | Percentage of agreed mandatory template fields completed, evidenced and approved for the pilot survey. | Controlled method record and review checklist. | Measure at method-record approval and end-of-pilot review. |
| Handover quality | Percentage of agreed handover-pack acceptance criteria demonstrated and accepted, with material issues separately recorded. | Demonstration record, test record and approver response. | At handover and end-of-month-three review. |

To be confirmed: baseline values, target thresholds, nominated approver, mandatory method-record fields and handover acceptance criteria. The board should interpret results against the approved baseline and criteria rather than against unsubstantiated improvement claims.

## Recommendation

We recommend that you approve Option 1: the scoped, one-time three-month pilot for one internal survey, at a full-scope total of £32,500 excluding VAT, subject to confirmation of VAT, excluded costs, staffing allocation, technical platform support, source-data access and acceptance criteria.

The pilot should remain limited to standardising sampling-method documentation and creating a repeatable dashboard handover. It should not be treated as evidence of quantified savings, revenue, payback or ROI before the agreed measures are captured and reviewed at the end of month three.

**BOARD ACTION REQUESTED:**

approve the pilot budget and scope; appoint the nominated approver and internal data owners; authorise discovery; and require a month-three review against the approved measures, risks and acceptance evidence.

Proposal validity is 60 days from the date of issue. Payment terms are invoiced monthly in arrears, payable within 30 days. Governing law is the law of England and Wales, with disputes referred to the courts of England and Wales. To be confirmed: date of issue, legal effect of this internal business-case draft, submission authorisation and any warranty or other commercial terms not stated above.

# Appendices

## Appendix A: Requirement Compliance Matrix

| Identifier | Buyer requirement | Status | Response location | Evidence basis | Remaining gap | Next action | Responsible role |
|---|---|---|---|---|---|---|---|
| BR-01 | Approve a one-time internal pilot to standardise sampling-method documentation and dashboard handover. | Proposed | Executive Summary; Proposed Solution | Proposed workflow and documented survey, data-engineering and dashboard methods. | Final workflow approval and staffing allocation. | Approve scope and confirm delivery allocation. | Board; Engagement Director |
| BR-02 | Cover one internal survey and last three months. | Proposed | Executive Summary; Implementation Plan | Supplied pilot scope and duration. | Kickoff date and internal-survey identification. | Confirm survey and mobilisation date. | Board; internal survey owner |
| BR-03 | Include analyst time, engineering time, four director days and three months of dashboard-platform licence. | Priced | Cost-Benefit Analysis; Resource Requirements | Supplied rates and planning allowances. | VAT and excluded-cost applicability. | Confirm tax and any required excluded services. | Bid team; finance reviewer |
| BR-04 | No client data is included. | Proposed control | Executive Summary; Proposed Solution; Risk Assessment | Supplied scope condition and proposed discovery controls. | Whether personal data exists in the internal pilot dataset. | Complete data inventory and determine data-protection requirements. | Lead Data Engineer; internal data owner |

| Identifier | Buyer requirement | Status | Response location | Evidence basis | Remaining gap | Next action | Responsible role |
|---|---|---|---|---|---|---|---|
| BR-05 | Operate within the £30,000 to £37,000 internal budget range. | Known-cost compliant | Cost-Benefit Analysis | £32,500 excluding VAT calculated from supplied price operands. | VAT and excluded or optional cost requirements. | Confirm full cost basis before approval. | Finance reviewer; board |
| BR-06 | Review at the end of month three using delivery time, completeness of method records and handover quality. | Proposed | Success Metrics; Implementation Plan | Supplied review measures and proposed measurement definitions. | Baseline, thresholds and acceptance criteria. | Approve measures during discovery. | Board; nominated approver; Senior Survey Analyst |
| BR-07 | Do not claim quantified savings, revenue forecasts or payback assumptions. | Compliant | Executive Summary; Cost-Benefit Analysis; Recommendation | Supplied limitation. | No numerical ROI can be calculated without quantified benefits. | Retain benefit evaluation as a pilot outcome only. | Board; Engagement Director |

## Appendix B: Relevant Illustrative Experience and References

All examples, organisations, contacts, projects and figures below are fictional and are included as illustrative evidence for this worked example. They do not establish pilot outcomes or guarantees.

- **Wexcombe District Council, resident feedback programme, 2023 to 2025:** Larkfield replaced four feedback forms with one survey and a weekly dashboard. The response rate rose from 9 percent to 23 percent over 18 months. Contract value was £212,000; delivery was on time and 3 percent under budget. This illustrates a combined survey and dashboard workflow. Reference: Corin Aldous, Head of Customer Services, corin.aldous@wexcombe-council.example, 01000 555 0101.
- **Tavistone Housing Association, tenant satisfaction measures, 2024:** Larkfield redesigned an annual tenant survey around regulator-required measures and built a quarterly board dashboard. The first quarterly dashboard reached the board six weeks after contract start. Contract value was £96,500. This illustrates survey-method and board-reporting work.
- **Ardmoor Borough Council, complaints and compliments analytics, 2023 to 2024:** Larkfield joined three data sources into one dashboard for 14 service managers. Median quarterly-report production time fell from 11 working days to 3. Contract value was £148,000 and delivery was on time. This is not comparable evidence for the proposed survey pilot and must not be used as a pilot forecast. Reference: Elspeth Rowan, Head of Corporate Performance, elspeth.rowan@ardmoor-council.example, 01000 555 0102.
- **Hollin & Rye Stores, sales dashboards, 2025:** Larkfield connected till, stock and loyalty data and produced weekly dashboards for shop managers. Reported stock-outs fell from an average of 14 per shop per month to 6 within four months. Contract value was £58,000. This illustrates dashboard data integration but is not comparable evidence for the proposed internal survey pilot.

Wexcombe District Council and Ardmoor Borough Council are the two local-authority references, and both contracts were completed within the last three years. To be confirmed: bid-team authorisation to offer any reference contact for this internal pilot decision.

## Appendix C: Open Confirmation Checklist

- **Technical configuration:** To be confirmed: dashboard-platform support for the proposed daily synchronisation, named-user access controls, backup retention, restore procedure and recovery testing. Owner: Lead Data Engineer. Next action: validate during discovery.
- **Integration:** To be confirmed: the pilot source system and approved export, database-view or API access route. Owner: internal data-access owner. Next action: complete data inventory.
- **Security:** To be confirmed: whether personal data is present and the final data-protection requirements for the internal pilot. Owner: Lead Data Engineer and nominated approver. Next action: complete and approve the data protection impact assessment where required.
- **Staffing and support:** To be confirmed: personnel availability, support contacts, support period and authority to commit to the proposed support targets. Owner: Engagement Director and bid team. Next action: confirm before mobilisation.
- **Commercial matters:** To be confirmed: VAT applicability, excluded-cost requirements, date of issue, legal effect, submission authorisation, warranty and any other unstated commercial term. Owner: finance and bid-team reviewers. Next action: complete commercial review before approval.
- **Acceptance:** To be confirmed: nominated approver, baseline values, success thresholds, mandatory method-record fields and handover acceptance criteria. Owner: board and internal survey owner. Next action: approve during discovery.