

## Epic Hypothesis Statement Template

<b>Funnel Entry Date:</b>	Aug 15, 2022																
<b>Epic Name:</b>	Duck Insights Data Mart Enrichment																
<b>Product Manager:</b>	Matt Betker, Service Delivery Manager, Azure DevOps																
<b>Business Owner:</b>	Director of Data Management & Analytics (starting September 2022)																
<b>Request Type:</b>	<input checked="" type="checkbox"/> Internal request <input type="checkbox"/> Government insertion of work																
<b>Strategic Themes/ Initiatives:</b>	Choose the Strategic Themes/Initiatives this Epic will fall under, or <input type="checkbox"/> None Listed																
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	Employees	Initially the LDW Project Team – expanding to 100 employees – within the Corporation	<input type="checkbox"/> Significant	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None											
	Service Centers		<input type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None											
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	MPI Customers		<input type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None											
Others, please specify		<input type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None												

<p><b>Epic Description:</b></p>	<p><i>For business users who consume policy data who need to glean business insights on said data</i></p> <p><i>the Duck Data Mart Enrichment is a enhancement that will enable similar reporting granularity to Autopac Online (AOL) unlike what is offered by Duck out of the box</i></p> <p><i>our solution allows for similar reporting detail to what business users have come to expect from our legacy systems</i></p> <p><i>The initiative is requesting approval for funding of \$150,000 from the 2022/23 Data Management and Analytics budget in support of this initiative.</i></p>																																					
<p><b>Business Outcome Hypothesis:</b></p>	<p>This is pre-requisite work for the LDW, to ensure Duck Insights data is available at the correct granularity for MPI business consumption. This work will be considered done when the scope of the [Redacted]'s CR is complete.</p>																																					
<p><b>Leading Indicators:</b></p>	<p>When [Redacted] completes their work as per the agreed upon CR 151054, and MPI staff have validated its accuracy.</p>																																					
<p><b>Non-Functional Requirements (NFRs):</b></p>	<table border="1"> <thead> <tr> <th></th> <th>Category</th> <th>Details of NFR</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Architecture</td> <td>Enhanced data sources are accessible from the LDW environments</td> </tr> <tr> <td>2</td> <td>Communication, Training &amp; Documentation</td> <td>N/A</td> </tr> <tr> <td>3</td> <td>Implementation Approach</td> <td>N/A</td> </tr> <tr> <td>4</td> <td>Information and Security</td> <td>N/A</td> </tr> <tr> <td>5</td> <td>Integration</td> <td>N/A</td> </tr> <tr> <td>6</td> <td>Legal</td> <td>N/A</td> </tr> <tr> <td>7</td> <td>Operational Support Model</td> <td>N/A</td> </tr> <tr> <td>8</td> <td>Organizational Change Implications (Roles, Responsibilities)</td> <td>N/A</td> </tr> <tr> <td>9</td> <td>Vendor Management</td> <td>N/A</td> </tr> <tr> <td>10</td> <td>Regulatory Accountability</td> <td>N/A</td> </tr> <tr> <td>10</td> <td>Others – Nova Analytics Team</td> <td>Nova Analytics Team have provided requirements to [Redacted] who will be engaged to complete the scope of work.</td> </tr> </tbody> </table>			Category	Details of NFR	1	Architecture	Enhanced data sources are accessible from the LDW environments	2	Communication, Training & Documentation	N/A	3	Implementation Approach	N/A	4	Information and Security	N/A	5	Integration	N/A	6	Legal	N/A	7	Operational Support Model	N/A	8	Organizational Change Implications (Roles, Responsibilities)	N/A	9	Vendor Management	N/A	10	Regulatory Accountability	N/A	10	Others – Nova Analytics Team	Nova Analytics Team have provided requirements to [Redacted] who will be engaged to complete the scope of work.
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<p>Delete sample form (page 1 &amp; 2) before submitting EHS template to the LPM Intake page. Upload completed EHS template to the <a href="#">LPM Intake Page</a> and complete the <a href="#">WSJF Calculator</a> template.</p> <p><b>Note:</b> If changes are required to the document, locate the Epic Name from the “My Submissions” area, click “Edit”, locate the attachment to edit and click to open, click “Edit Document” and edit the save the document. Click the “Save” button at the bottom of the epic form.</p>																																						

## Lean Business Case for DMA Duck Data Mart Enrichment

<b>Epic/Business Case Name:</b> DMA Duck Data Mart Enrichment	<b>Epic Number:</b> <i>(Assigned by APMO)</i> 191416	<b>Business Case Number:</b> 2023-021
<b>Prepared By:</b> Matt Betker, Service Delivery Manager	<b>Business Owner:</b> Syed Qadri, Director of Data Management and Analytics	<b>Business Case Funnel Entry Date:</b> 08/29/2022
<b>Department:</b> Data Management and Analytics	<b>Division:</b> IT Division	<input checked="" type="checkbox"/> <b>Single Year Budget</b> <input type="checkbox"/> <b>Multi-Year Budget</b>

<p><b>Key Stakeholders:</b> <i>(List the names of key stakeholders)</i>                  Data Management and Analytics department – Consumers of work                  Other business units at MPI who will require access to Duck Policy Data</p>	
<p><b>Epic Description:</b> <i>(From Epic Hypothesis Statement. Then brief explanation of business need and describe final deliverable)</i>                  For business users who consume policy data                  who need to glean business insights on said data                  the Duck Data Mart Enrichment                  is a enhancement                  that will enable similar reporting granularity to Autopac Online (AOL)                  unlike what is offered by Duck out of the box                  our solution allows for similar reporting detail to what business users have come to expect from our legacy systems</p>	
<p><input checked="" type="checkbox"/> Corporate Strategic Initiative/Stream</p> <p><input type="checkbox"/> Government directive</p> <p><input type="checkbox"/> Other</p> <p><b>Brief description:</b> <i>(Elaborate on source of request if this will provide additional context (i.e. what was government request, where does strategic initiative fit in to the annual strategic plan etc..))</i></p>	
<p><b>Business Outcome Hypothesis:</b> <i>(See Epic Hypothesis Statement. Describe evidence that MVPs are functional; Describe how the success of the epic will be measured: for example, 50% increase in shoppers under 25; Availability increases from 95% to 99.7%, etc. - indicate that these outcomes would be monitored on an ongoing basis and list milestone dates if known)</i></p> <p><b>This is pre-requisite work for the LDW, to ensure Duck Insights data is available at the correct granularity for MPI business consumption. This work will be considered done when the scope of the [Redacted]'s CR is complete.</b></p>	<p><b>Leading Indicators:</b> <i>(See Epic Hypothesis Statement. Establish innovation accounting metrics to provide leading indicators of the outcomes hypothesis: for example, a measurable change in purchaser demographics within 30 days of feature release, earned value factors)</i></p> <p>When [Redacted] completes their work as per the agreed upon CR 151054, and MPI staff have validated its accuracy.</p>

<p><b>In Scope:</b></p> <ul style="list-style-type: none"> <li>• <b>[Redacted]</b> (vendor) to perform Duck data mart enrichment.</li> <li>• MPI Staff to validate the work was done correctly.</li> <li>• ...</li> </ul>	<p><b>Out of Scope:</b></p> <ul style="list-style-type: none"> <li>• None</li> <li>• ...</li> <li>• ...</li> </ul>	<p><b>Nonfunctional Requirements:</b> <i>(See Epic Hypothesis Statement – that lists definition. In addition list the internal departments that need to be consulted to assess impact to implementation)</i></p> <ul style="list-style-type: none"> <li>• <b>Architecture</b> – Enhanced data sources are accessible from the LDW environment</li> <li>• <b>Communications</b> – n/a</li> <li>• <b>Implementation Approach</b> – n/a</li> <li>• <b>Integration</b> - n/a</li> <li>• <b>Vendor Management</b> – n/a</li> <li>• <b>Legal</b> – n/a</li> <li>• <b>Operational Support Model</b> – n/a</li> <li>• <b>Organizational Change Implications (Roles, Responsibilities)</b> – n/a</li> <li>• <b>Information Security Office</b> - n/a</li> <li>• <b>Regulatory Accountability</b></li> </ul> <p>Does this project require that any new legislation be introduced, or existing legislation be amended or repealed? (Acts or Regulations)  <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Does this project require that any new Policies and Forms (Regulatory Instruments) be introduced, or existing Policies or Forms be amended or repealed?  <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>If the answer to either question is Yes, the Regulatory Accountability Office must be consulted. The RAO must complete the following:</b></p> <p><b>Review Date:</b> MM/DD/YYYY  <b>Reviewer:</b>          This project is determined to be a “Regulatory Project” as per the Regulatory Accountability Act and must be coordinated with the RAO:  <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p><b>Minimum Viable Product (MVP) Features –</b> <i>(early indicator – functional, working, in production and delivers value. Example is MS 365 and how basic functionality was created as initial MVP and plan is for features to be added – calendar (feature), file sharing (feature), etc.)</i></p> <ul style="list-style-type: none"> <li>• Completion of work as per ADO <a href="#">CR 151054</a>.</li> </ul>	<p><b>Additional Potential Features –</b> <i>(building on the MVP – represents other features of lower priority and anticipated timing.)</i></p> <ul style="list-style-type: none"> <li>• None</li> <li>• ...</li> <li>• ...</li> </ul>	

<p><b>Analysis Summary:</b> <i>(Brief summary of the analysis that has been formed to create the business case. Outcome of discussion from Cadence meetings resulting from Epic Hypothesis Statement, and reference material (white papers), preliminary costing – benefits as part of the outcomes defined in the Epic Hypothesis Statement. Any proof of concepts that were completed – artifacts and research.)</i></p> <p>Upon reviewing the information available via the Duck Data Mart, MPI architects and Analysts realized it would not be sufficient for reporting needs at MPI. Due to capacity constraints, MPI hired [REDACTED] to perform the work of enhancing the Mart to offer policy detail more accustomed to what MPI business users are used to.</p> <p>This work will be consumed via the Logical Data Warehouse (LDW) at a later date.</p>	<p><b>Milestones/Checkpoints :</b> <i>(include milestone or checkpoint dates for MVP(s) start/completion if known)</i></p> <p>Duck Data Mart Enrichment completed by [REDACTED] by August 31, 2022</p> <p>Enrichment work is validate by an MPI analyst from the NOVA Analytics team. October 15, 2022.</p>
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<p><b>Approval Request/Recommendation for LPM Committee:</b> <i>(Define the ask – resources, specific incremental funding based on detailed costing to be completed to support the recommendation.)</i></p> <p>This work has already been committed to through NOVA. Our recommendation is to approve this Epic in order for the DM&amp;A department to cover the costs associated with these changes.</p> <p>The initiative is requesting endorsement for approval of \$150,000 from the 2022/23 Data Management &amp; Analytics budget in support of this initiative.</p>
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<p><b>Solution Analysis- (completed in collaboration with Solution Group) The Cadence meetings will assist in this process with input from stakeholders</b></p>
<p><b>Which Internal and/or external customers are affected, and how?</b> <i>(Describe the user community and any markets affected)</i></p> <p>The foundational work is a requirement as part of supporting internal reporting requirements by Business Users who require access to policy data to facilitate this process.</p>
<p><b>What is the potential impact on solutions, programs and services?</b> <i>(Identify solutions, programs, services, teams, departments, etc. that will may be impacted by this epic)</i></p> <p>It continue to provide MPI business users with access to the same level of policy data granularity users are currently using as part of reporting as accessible within AOL today.</p>
<p><b>What is the potential impact on sales, distribution, deployment and support?</b> <i>(For external solutions or products, describe any potential impact on how the product is sold, distributed, or deployed)</i></p> <p>There may be some future enhancements performed to this code base as required by the Data Management and Analytics department.</p>

Forecasted Costs – TO BE COMPLETED BY SOLUTION GROUP	
<p><b>T-Shirt Estimates:</b> <i>(As included in Epic Hypothesis Statement)</i> Small – MPI is only responsible to verify [Redacted]'s work.</p>	<p><b>Details:</b> <i>(As included in Epic Hypothesis Statement)</i> N/A</p>
<p><b>MVP Cost:</b> <i>(What is the investment requested to fund the MVP (the MVP cost)? Include date of MVP cost estimate being requested.)</i> The DM&amp;A department has budgeted \$150,000 for this work. The money will come from the 3.1M budgeted for Data and Analytics projects in the 2022/23 fiscal year.</p>	<p><b>Estimated Implementation Cost:</b> <i>(What is the estimated investment (cost) of full implementation of the epic if the MVP hypothesis is proven true? This estimate is refined of over time)</i>  \$150,000 <b>Initial estimate:</b> <i>(This can be expressed as a range)</i>  <b>Refined estimate(s):</b> <i>(Identify material updates to the estimated implementation cost, usually informed from experiments. Include date of refined estimate.)</i></p>
Forecasted Returns	
<p><b>Type of Return:</b> <i>(Market share, increased revenue, improved productivity, new markets served, reduced risk, financial net present value etc.)</i> Improved productivity when accessing Duck policy data.</p>	

Development Strategy (completed in collaboration with Solution Group)
<p><b>In-house or Outsourced Development:</b> <i>(Provide recommendations for where the epic should be developed)</i> Outsourced development to [Redacted]. MPI will only be validating the work.</p>
<p><b>Incremental Implementation Strategy:</b> <i>(Epics are defined as a single whole, but each epic undergoes incremental implementation. Click <a href="#">here</a> for details on potential strategies. i.e. Spike first, Some features first, Architectural epic first, vertical slice, concurrent/sequential implementation etc...)</i> Implementation will be coordinated with the NOVA analytics team.</p>
<p><b>Sequencing and Dependencies:</b> <i>(Describe any constraints for sequencing the epic and identify any potential dependencies with other epics or solutions)</i> Verification will need to be completed before production deployment.</p>

**Risk Analysis**

**Risks/Obstacles of Proceeding with Project:** *(A high likelihood of risk without sufficient planned action for mitigation may impact the discount rate used in calculating the Net Present Value of forecasted financial benefits. Impact to be discussed with VMO)*

Potential Risk	Likelihood	Severity	Description of Impact of Risk and description of planned action taken to mitigate this risk
NOVA Analytics team are taken off critical path activities to complete verification.	<input type="checkbox"/> High <input type="checkbox"/> Medium <input checked="" type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input checked="" type="checkbox"/> Low	Verification will need to be deferred until NOVA analytics work is off the critical path.
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	

**Risks/Obstacles of NOT Proceeding with Project**

Potential Risk	Likelihood	Severity	Description of Impact of Risk and description of planned action taken to mitigate this risk
This work will have to be performed by someone prior to setting up the Duck data source within the LDW.	<input type="checkbox"/> High <input checked="" type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input checked="" type="checkbox"/> Medium <input type="checkbox"/> Low	N/A
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	
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**Assumptions**

*(What are you assuming to be true, or what conditions are you assuming will prevail that will make this achievable)*

Cost Assumptions <i>(What sources were used to generate costs)</i>	A quote from [Redacted] around \$150,000
Cost/Benefit Assumptions <i>(What discount rate was used)</i>	None
Other Assumptions	[Redacted] will deliver within their quoted amount.

<b>Alternative Solutions</b>		
<i>(Describe at least two available alternatives that would achieve the project objectives)</i>		
Alternative 1	This development is handled internally at a later time.	
Alternative 2		
Evaluation Areas	<b>Alternative 1</b>	<b>Alternative 2</b>
Benefits (Financial/Non-financial)	None	
Cost	None, as this would require external labour due to capacity constraints	
Risk	Work may not be ready when needed.	
<b>Reason for not selecting this solution</b>		

<b>Additional Supporting Data (completed in collaboration with Solution Group)</b>
<p><b>Attachments:</b> <i>(Other supporting documentation, links to other data, feasibility or trade studies, models, market analysis, etc., that were used in the creation of the business case)</i></p> <p>Reference to the CR in ADO: <a href="#">Change Request 151054: CR#9: Assessment of R1A Reports - Insights - Boards (azure.com)</a></p>
<p><b>Other Notes and Comments:</b> <i>(Any additional miscellaneous Information relevant to LPM)</i></p> <p>None.</p>

### ECM Knowledge Platforms - Epic Hypothesis Statement

<b>Funnel Entry Date:</b>	August 2022												
<b>Epic Name:</b>	ECM Knowledge Platforms												
<b>Product Manager:</b>	<ul style="list-style-type: none"> <li>• Joelle Curtaz (Product Manager, ECM) Role: Lead Product Manager</li> <li>• Janine Pursaga (Manager, KMS, Technical Writing &amp; Communications) Role: KMS Manager</li> </ul>												
<b>Business Owner:</b>	<ul style="list-style-type: none"> <li>• Tamara Boblinski – Director, Change &amp; Knowledge Management Role: Business Owner, Corporate Knowledge</li> </ul> <p>Stakeholders</p> <ul style="list-style-type: none"> <li>• Christian Sentner (Manager, Design &amp; Digital Experience) Role: Branding/Front End</li> <li>• TBC - Director, Communications, Brand &amp; Marketing Role: Communications</li> <li>• Bradley Moore - Director, Customer Experience Role: Brand and Experience</li> <li>• Peter Garn - Director, Enterprise Application Management Role: Application / Service Platform</li> <li>• Shawn Campbell – Director, Enterprise Architecture Role: Technology Strategy, Corporate Strategy Technical Enablement</li> </ul>												
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Impacted Groups:		Approx. number of affected individuals	Level of Impact			
	Employees	All Staff (2000)	<input checked="" type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input type="checkbox"/> None
Service Centers	Knowledge Portals, Workflows (1000)	<input checked="" type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input type="checkbox"/> None	
Autopac Agents	Knowledge Portals (340+ locations)	<input checked="" type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input type="checkbox"/> None	
Partners	DEIC, Repair Shops	<input type="checkbox"/> Significant	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input type="checkbox"/> None	

  

<b>Epic Description:</b>	<p><b>Context:</b> [REDACTED]</p> <p><b>Opportunity:</b> Currently MPI has multiple publishing solutions. The goal of the initiative is to implement a standardized, single publishing solution on [Redacted] that will be used as part of publishing the content within the Public Website, Intranet, KnowledgeNet and Brokers Online. Moving towards a single product for publishing will improve business and IT operations.</p> <p>This solution will serve as a building block and provide additional opportunities to move additional Knowledge Management Services (KMS) services including MPI partners, such as Brokers, to this new platform.</p> <p><b>Hypothesis:</b>  <b>For</b> MPI staff and Brokers  <b>who</b> need information about MPI products, services and business processes  <b>the</b> integrated knowledge portal  <b>is a</b> web portal that connects knowledge seekers with curated content  <b>that</b> provides persona based search and automated content recommendations  <b>unlike</b> the current solution which does not provide a single source of truth for knowledge  <b>our solution</b> allows seamless content distribution to relevant personas, content is recommended and easily discoverable based on personalization preferences, allow curators the ability to publish targeted content</p> <p><b>Execution:</b> The project will be managed by the ECM Project Manager, Joelle Curtaz, with in partnership with Janine Pursaga , Manager, KMS Technical Writing and Communications, as the Business Owner.</p>
<b>Business Outcome Hypothesis:</b>	<p>Measurable benefits that the business can anticipate if the epic hypothesis is proven correct include:</p> <ul style="list-style-type: none"> <li>• Standardize and simplify the publishing process</li> <li>• Empower the business to make changes to administer the solution</li> <li>• Reduction of content search time, improved content relevance</li> <li>• Improvement of accessibility standards</li> </ul>

<b>Leading Indicators:</b>	<ul style="list-style-type: none"> <li>• Reduction in time to publish and update articles: automation of the publishing process</li> <li>• Automation of content replication: # related content zones are automatically updated</li> <li>• Reduced dependency of IT technical resources: additional self-service processes</li> <li>• End User Personalization: # favorite tags, content types, etc</li> <li>• Provide new publishing options: # of styles and content zones</li> </ul>		
<b>Non-Functional Requirements (NFRs):</b>		<b>Category</b>	<b>Details of NFR</b>
	1	Architecture	Cloud First Alignment, Utilizes existing assets in [Redacted]
	2	Communication, Training & Documentation	Draft communication to impacted internal and external stakeholders
	3	Implementation Approach	Availability of implementation plan to support smooth transition and migration from on premise to the cloud
	4	Information and Security	Adherence with all current CIS Policies and Standards
	5	Integration	Allow secure and real time and on demand integration capabilities
	6	Legal	Compliance to regulatory and contractual requirements and other legal and regulatory requirements on data residency, data, privacy and cloud
	7	Operational Support Model	An ECM team is being established to manage [Redacted]
	8	Organizational Change Implications (Roles, Responsibilities)	Significant change for users of KnowledgeNet and Brokers Online. Communications and change management support will be needed.
	9	Vendor Management	None at this time
	10	Availability	99% availability and disaster recovery plan in place ensuring ease of recovery in the event of an outage
	11	Scalability	Cloud based solution can meet spikes in website demand
	12	Performance	The application load time must be no more than 2 seconds
<p>Delete sample form (page 1 &amp; 2) before submitting EHS template to the LPM Intake page. Upload completed EHS template to the <a href="#">LPM Intake Page</a>.</p>			

## Lean Business Case for ECM Knowledge Platforms

<b>Epic/Business Case Name:</b> ECM Knowledge Platforms	<b>Epic Number:</b> 173577	<b>Business Case Number:</b> 2023-020
<b>Prepared By:</b> Joelle Curtaz, Value Stream Product Manager, Product Management Gary Pronych, Consultant, Enterprise Architecture	<b>Business Owner:</b> Tamara Boblinski, Director, Change and Knowledge Management	<b>Business Case Funnel Entry Date:</b> 08/17/2022
<b>Department:</b> Product Management, Enterprise Architecture	<b>Division:</b> IT	<input checked="" type="checkbox"/> <b>Single Year Budget</b> <input type="checkbox"/> <b>Multi-Year Budget</b>

**Key Stakeholders:** *(List the names of key stakeholders)*

- Christian Sentner (Manager, Design & Digital Experience)  
Role: Branding/Front End
- TBC - Director, Communications, Brand & Marketing  
Role: Communications
- Bradley Moore - Director, Customer Experience  
Role: Brand and Experience
- Peter Garn - Director, Enterprise Application Management  
Role: Application / Service Platform
- Shawn Campbell – Director, Enterprise Architecture  
Role: Technology Strategy, Corporate Strategy Technical Enablement

**Epic Description:** *(From Epic Hypothesis Statement. Then brief explanation of business need and describe final deliverable)*

**Context:**  
Microsoft is discontinuing support for SharePoint 2013 as of April 11, 2023 which will ultimately result in significant risk to our entire SharePoint 2013 Platform which is classified as a tier one platform. The SharePoint solution hosts Brokers Online, KnowledgeNet and other solutions from the impacted groups above such as Intranet and SharePoint sites. This release will have to be coordinated around the R1 and R2 release dates.

**Opportunity:**  
Currently MPI has multiple publishing solutions. The goal of the initiative is to implement a standardized, single publishing solution on [Redacted] that will be used as part of publishing the content within the Public Website, Intranet, KnowledgeNet and Brokers Online. Moving towards a single product for publishing will improve business and IT operations.  
This solution will serve as a building block and provide additional opportunities to move additional Knowledge Management Services (KMS) services including MPI partners, such as Brokers, to this new platform.

**Hypothesis:**  
**For** MPI staff and Brokers  
**who** need information about MPI products, services and business processes  
**the** integrated knowledge portal

<p>is a web portal that connects knowledge seekers with curated content that provides persona based search and automated content recommendations unlike the current solution which does not provide a single source of truth for knowledge</p> <p>our solution allows seamless content distribution to relevant personas, content is recommended and easily discoverable based on personalization preferences, allow curators the ability to publish targeted content</p> <p><b>Execution:</b> The project will be managed by the ECM Project Manager, Joelle Curtaz, in partnership with Janine Pursaga , Manager, KMS Technical Writing and Communications, as the Business Owner.</p>		
<p><input checked="" type="checkbox"/> Corporate Strategic Initiative/Stream</p> <p><input type="checkbox"/> Government directive</p> <p><input type="checkbox"/> Other</p> <p><b>Brief description:</b> <i>(Elaborate on source of request if this will provide additional context (i.e. what was government request, where does strategic initiative fit in to the annual strategic plan etc..))</i></p>		
<p><b>Business Outcome Hypothesis:</b> Measurable benefits that the business can anticipate if the epic hypothesis is proven correct include:</p> <ul style="list-style-type: none"> <li>• Standardize and simplify the publishing process</li> <li>• Empower the business to make changes to administer the solution</li> <li>• Reduction of content search time, improved content relevance</li> <li>• Improvement of accessibility standards</li> </ul>	<p><b>Leading Indicators:</b></p> <ul style="list-style-type: none"> <li>• Reduction in time to publish and update articles: automation of the publishing process</li> <li>• Automation of content replication: # related content zones are automatically updated</li> <li>• Reduced dependency of IT technical resources: additional self-service processes</li> <li>• End User Personalization: # favorite tags, content types, etc</li> <li>• Provide new publishing options: # of styles and content zones</li> </ul>	
<p><b>In Scope:</b></p> <ul style="list-style-type: none"> <li>• KnowledgeNet</li> <li>• Brokers Online</li> </ul>	<p><b>Out of Scope:</b></p> <ul style="list-style-type: none"> <li>• MPI Partners</li> <li>• All other portals</li> </ul>	<p><b>Nonfunctional Requirements:</b></p> <ul style="list-style-type: none"> <li>• <b>Architecture</b> - Cloud First Alignment, Utilizes existing assets in [Redacted]</li> <li>• <b>Communication, Training &amp; Documentation</b> - Draft communication to impacted internal and external stakeholders</li> <li>• <b>Implementation Approach</b> - Availability of implementation plan to support smooth transition and migration from on premise to the cloud</li> <li>• <b>Information and Security</b> - Adherence with all current CIS Policies and Standards</li> <li>• <b>Integration</b> - Allow secure and real time and on demand integration capabilities</li> <li>• <b>Legal</b> - Compliance to regulatory and contractual requirements and other legal and regulatory requirements on data residency, data, privacy and cloud</li> <li>• <b>Operational Support Model</b> -An ECM team is being established to manage [Redacted]</li> <li>• <b>Organizational Change Implications</b> - Significant change for users of</li> </ul>

		<p>KnowledgeNet and Brokers Online. Communications and change management support will be needed.</p> <ul style="list-style-type: none"> <li>• <b>Vendor Management</b> - None at this time</li> <li>• <b>Availability</b> - 99% availability and disaster recovery plan in place ensuring ease of recovery in the event of an outage</li> <li>• <b>Scalability</b> -Cloud based solution can meet spikes in website demand</li> <li>• <b>Performance</b> - The application load time must be no more than 2 seconds</li> <li>• <b>Regulatory Accountability</b></li> </ul> <p>Does this project require that any new legislation be introduced, or existing legislation be amended or repealed? (Acts or Regulations) <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does this project require that any new Policies and Forms (Regulatory Instruments) be introduced, or existing Policies or Forms be amended or repealed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>If the answer to either question is Yes, the Regulatory Accountability Office must be consulted. The RAO must complete the following:</b></p> <p><b>Review Date:</b> MM/DD/YYYY <b>Reviewer:</b> This project is determined to be a “Regulatory Project” as per the Regulatory Accountability Act and must be coordinated with the RAO: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p><b>Minimum Viable Product (MVP) Features</b></p> <ul style="list-style-type: none"> <li>• Consistent branding and user experience</li> <li>• Simplified authoring and publishing</li> <li>• Simplified search</li> <li>• Content tagging</li> </ul>	<p><b>Additional Potential Features –</b> <i>(building on the MVP – represents other features of lower priority and anticipated timing.)</i></p> <ul style="list-style-type: none"> <li>• Broker and user feedback loops</li> <li>• Integration with other portals</li> <li>• Increase community engagement and support</li> </ul>	

<p><b>Analysis Summary:</b></p> <ul style="list-style-type: none"> <li>• Assess market trends and best practices</li> <li>• Costing with potential vendors</li> <li>• Assess business requirements</li> <li>• Assess corporate objectives</li> <li>• Assess team capacity and priorities</li> <li>• Involvement security and records management</li> </ul>	<p><b>Milestones/Checkpoints :</b></p> <p>Jan – April 2022: Requirements and Market Assessment (Complete)</p> <p>Sept – Oct 2022: Onboard Consultants</p> <p>Oct – Feb 2023: Design, Implementation, Content conversion</p> <p>Jan – Feb 2023: Proof of concept using sample business area content</p> <p>Feb - April 2023: MVP Launch</p>
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**Approval Request/Recommendation for LPM Committee:** *(Define the ask – resources, specific incremental funding based on detailed costing to be completed to support the recommendation.)*

**Project Funding**

The budget for this Epic is part of the 2022/23 Capital Master Summary - Knowledge Platforms & Content Management funding envelope and the Public website & Partner website funding envelope (\$2M in each envelope).

Note that in the Context section of the Epic Description above, all four epics, 3113, 3114, 3141, and this request, will be part of these two funding envelopes.

Total forecasted cost is \$1,001,650 as per the WSJF project costs table and funding allocations are \$663,000 to Knowledge Platforms & Content Management and \$338,650 allocated to Public Website and Partner Website.

**Solution Analysis- (completed in collaboration with Solution Group) The Cadence meetings will assist in this process with input from stakeholders**

**Which Internal and/or external customers are affected, and how?** *(Describe the user community and any markets affected)*

All employees that use KnowledgeNet will be impacted.

Brokers are impacted as they use Brokers Online.

Positive impact through improved search, engagement, knowledge management.

Negative impacts include learning a new solution.

**What is the potential impact on solutions, programs and services?** *(Identify solutions, programs, services, teams, departments, etc. that will may be impacted by this epic)*

Communications & Brand

- The internal and external brand will be standardized
- Publishing processes need to change to support the new technology

Employee and Broker, Digital Experience

- The internal and external experience will be improved
- External authentication will be improved as brokers will use the same login for all MPI services

Nova

- Internal and external stakeholders will use KnowledgeNet and Brokers Online to learn about existing services and changes delivered through Nova

<p><b>What is the potential impact on sales, distribution, deployment and support?</b> <i>(For external solutions or products, describe any potential impact on how the product is sold, distributed, or deployed)</i></p> <p>Positive</p> <ul style="list-style-type: none"> <li>• Improvements in how communication is distributed</li> <li>• Improved ability to meet accessibility objectives</li> </ul> <p>Negative</p> <ul style="list-style-type: none"> <li>• Support: Employees, Brokers and support staff need to learn the new solution</li> </ul> <p>No change expected sales and distribution are not expected to change</p>	
<b>Forecasted Costs – TO BE COMPLETED BY SOLUTION GROUP</b>	
<p><b>T-Shirt Estimates:</b> <i>(As included in Epic Hypothesis Statement)</i> (As included in Epic Hypothesis Statement)</p>	<p><b>Details:</b> <i>(As included in Epic Hypothesis Statement)</i> Refer to the go / no go section</p>
<p><b>MVP Cost:</b> <i>(What is the investment requested to fund the MVP (the MVP cost)? Include date of MVP cost estimate being requested.)</i> Refer to the go / no go section. Beyond MVP will be executed by the existing operational team.</p>	<p><b>Estimated Implementation Cost:</b> <i>(What is the estimated investment (cost) of full implementation of the epic if the MVP hypothesis is proven true? This estimate is refined of over time)</i> Refer to the go / no go section</p> <p><b>Initial estimate:</b> <i>(This can be expressed as a range)</i> <b>Refined estimate(s):</b> <i>(Identify material updates to the estimated implementation cost, usually informed from experiments. Include date of refined estimate.)</i></p>
<b>Forecasted Returns</b>	
<p><b>Type of Return:</b> <i>(Market share, increased revenue, improved productivity, new markets served, reduced risk, financial net present value etc.)</i></p> <p>Cost Reduction: Elimination of SharePoint 2013 hosting of 72,000/year</p>	

<b>Development Strategy (completed in collaboration with Solution Group)</b>
<p><b>In-house or Outsourced Development:</b> External resources will be used to define the architecture, backlog, security needs and feature implementation. Internal resources (Digital Experience) will support the user experience and brand.</p>
<p><b>Incremental Implementation Strategy:</b> Refer to the milestones section. The MVP must be equal to, or greater than the existing solution to meet the business needs. This solution is required for Nova to support MPI employees and brokers. The current approach is to release a fully functional MVP after release 1A.</p>
<p><b>Sequencing and Dependencies:</b> This solution is a requirement to retire SharePoint 2013 by April 2023.</p> <ol style="list-style-type: none"> <li>1. Guidance from the vendor for design and content conversion</li> <li>2. MVP release to be aligned with Nova</li> </ol>

Refer to the milestones section for more details.

**Risk Analysis**

**Risks/Obstacles of Proceeding with Project:***(A high likelihood of risk without sufficient planned action for mitigation may impact the discount rate used in calculating the Net Present Value of forecasted financial benefits. Impact to be discussed with VMO)*

Potential Risk	Likelihood	Severity	Description of Impact of Risk and description of planned action taken to mitigate this risk
Epic is not completed by April 2023	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	Prepare to run the new solution in an MVP state.
Content is not fully migrated by MVP date	<input type="checkbox"/> High <input checked="" type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input checked="" type="checkbox"/> Medium <input type="checkbox"/> Low	Automate content migration and procure external resources to assist in content migration
Lack of understanding how these solutions fit into the Nova big picture	<input type="checkbox"/> High <input checked="" type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input checked="" type="checkbox"/> Low	Engagement with the Directors of Communication and Employee Experience to map out how these solutions could integrate into the digital experience

**Risks/Obstacles of NOT Proceeding with Project**

Potential Risk	Likelihood	Severity	Description of Impact of Risk and description of planned action taken to mitigate this risk
Malicious attack	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	Ransome attack. Limited mitigation, a) pay the ransome b) extremely manual process of backup and migration in a secure location
Service availability	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	Employees and brokers will not be able to access knowledge on our products and services
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	

**Assumptions**

*(What are you assuming to be true, or what conditions are you assuming will prevail that will make this achievable)*

Cost Assumptions <i>(What sources were used to generate costs)</i>	Consulting rates at market value. No additional software is needed.
Cost/Benefit Assumptions <i>(What discount rate was used)</i>	The existing SharePoint 2013 environment can be fully decommissioned eliminating \$72,000\$/yearly
Other Assumptions	SharePoint 2013 life will not be extended by the vendor, if provided, the costs will be beyond the costs of this epic

September 12, 2023  
June 15, 2023

CONFIDENTIAL  
CONFIDENTIAL

MPI Exhibit # 33  
2024 GENERAL RATE APPLICATION  
Part V – VA Appendix 15a - Redacted

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<b>Alternative Solutions</b>		
<i>(Describe at least two available alternatives that would achieve the project objectives)</i>		
Alternative 1	Adoption of product: Unily	
Alternative 2	Adoption of product: Bloomfire	
Evaluation Areas	<b>Alternative 1</b>	<b>Alternative 2</b>
Benefits (Financial/Non-financial)	Leverage our existing investment in SharePoint Online	Market leading knowledge management solution. Many features of the box
Cost	High, yearly reoccurring fees	High, expensive product. Limited support and customization options.
Risk	Medium; doesn't meet all requirements, customization is limited	Medium; Does not meet all requirements. We have little to no ability to close requirement gaps.
<b>Reason for not selecting this solution</b>	Does not meet key requirements out of the box.	Does not meet all requirements. We have little to no ability to close requirement gaps.

<b>Additional Supporting Data (completed in collaboration with Solution Group)</b>
<b>Attachments:</b> <i>(Other supporting documentation, links to other data, feasibility or trade studies, models, market analysis, etc., that were used in the creation of the business case)</i>
<b>Other Notes and Comments:</b> <i>(Any additional miscellaneous Information relevant to LPM)</i> This LBC represents the 4 <sup>th</sup> of the 4 projects being funded by the FY2022/23 capital budget. The solution is related to the Enterprise Content Management strategic Initiative.

## Epic Hypothesis Statement Template

<b>Funnel Entry Date:</b>	Apr 29, 2022					
<b>Epic Name:</b>	EHS – eTransfer Total Loss (#177369)					
<b>Product Manager:</b>	Kerry Skibinski, Consultant, Strategy & Portfolio Management					
<b>Business Owner:</b>	Michael Gandhi, Corporate Controller, Corporate Controller Office					
<b>Request Type:</b>	<input checked="" type="checkbox"/> Internal request <input type="checkbox"/> Government insertion of work					
<b>Strategic Themes/ Initiatives:</b>	Choose the Strategic Themes/Initiatives this Epic will fall under, or <input type="checkbox"/> None Listed					
	<b>Customer Focus</b>	<b>Product Innovation</b>	<b>Process Automation</b>	<b>NOVA/Technology</b>	<b>People, Culture, Leadership</b>	<b>Business Capabilities</b>
	<input checked="" type="checkbox"/> Operationalize Customer Standards <input type="checkbox"/> Customer Experience Maturity	<input type="checkbox"/> Product Roadmap <input type="checkbox"/> Road Safety Strategy	<input type="checkbox"/> IFRS 17/9 <input type="checkbox"/> EPM & Target Op Model <input type="checkbox"/> Core Process Re-Engineering Vision <input type="checkbox"/> ALM Optimization <input type="checkbox"/> Op Risk Management	<input checked="" type="checkbox"/> NOVA Finance Deliverables <input type="checkbox"/> NOVA Legislation Changes <input type="checkbox"/> NOVA 2021/22 Delivery <input type="checkbox"/> IT Transformation & TRM/ISM <input type="checkbox"/> NOVA Op Readiness	<input type="checkbox"/> Culture 2.0 <input type="checkbox"/> Talent 2.0 <input type="checkbox"/> Professional & Leadership Development	<input type="checkbox"/> Adopt SAFe <input type="checkbox"/> Change Management <input type="checkbox"/> Future Workplace
<b>Impacted Groups:</b>		<b>Approx. number of affected individuals</b>	<b>Level of Impact</b>			
	Employees		<input type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None
	Service Centers		<input type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None
	Autopac Agents		<input type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None
	Partners		<input type="checkbox"/> Significant	<input type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input checked="" type="checkbox"/> None
	MPI Customers		<input checked="" type="checkbox"/> Significant	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input type="checkbox"/> None
	Others, please specify	Claims, Salvage, AOL (See Note below?)	<input checked="" type="checkbox"/> Significant	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/> Minor	<input type="checkbox"/> None

<p><b>Epic Description:</b></p>	<p><b><u>Background</u></b></p> <p>This new Epic is dependent on the completed Business Case #21-04-e-transfer capability (also referred to as an e-transfer enabler) The e-transfer Total Loss Epic provides a source to use the e-transfer enabler not added scope to the e-transfer capability Epic. The e-transfer enabler is a generic service intended to support multiple sources as required. The planned solution closely aligns with the EFT and Cheque process where [Redacted] is utilized.</p> <p><b><u>Notes re: Impacted Groups</u></b></p> <p>Initial assessments by the CARS support team indicates the e-Transfer Total Loss Epic is not needing updates to AOL. System changes to CARS, interface changes to [Redacted] and processes in Finance and Salvage are initially expected.</p> <p><b><u>Epic Description</u></b></p> <p><b>For</b> eligible customers/lienholders/(leasing) companies  <b>who</b> are owed monies for a Total Loss settlement, payment will be provided through eTransfer (Electronic Funds Transfer) to their bank accounts through  <b>the</b> MPI eTransfer service which  <b>is a</b> MPI controlled bank to bank mechanism of cash transfer  <b>that</b> eliminates the need for cheques/delays  <b>unlike</b> the current cheque based payment method used for Total Loss settlement payments that delay cash transfer and creates significant administration delays/costs  <b>our solution</b> provides a fast, cost effective and alternative payment method than a cheque issuance for transferring monies to customers/lienholders and companies eligible to receive an eTransfer payment.</p>
<p><b>Business Outcome Hypothesis:</b></p>	<p>The measurable benefits that the business can anticipate if the epic hypothesis is proven to be correct – leading to a reduction in cheques and increasing the effectiveness of cash delivery to our claimants/customers. The primary wins from e-Transfer are:</p> <p>The primary project benefits include:</p> <ol style="list-style-type: none"> <li>1. improved customer service through available options</li> <li>2. improved customer service through updated technology</li> <li>3. improved customer service through shortened duration between payment approval and receipt</li> <li>4. improved operational efficiencies and cost savings through bulk e-transfer option</li> <li>5. improved system integration whereby customer/claimant e-transfer information can be leveraged</li> <li>6. reduced costs processing e-transfer for volumes over 440 per month, savings per month increase as monthly volumes increase.</li> <li>7. reduced timing of providing payment electronically (same day) versus issuing a cheque (printing, processing, mailing) with an average 3-4 day duration once cheque payment is requested.</li> </ol>

<p><b>Leading Indicators:</b></p>	<ul style="list-style-type: none"> <li>• Customer NPS (Net Promoter Score)</li> <li>• Decrease in cycle times for funds transfers for Total Loss using e-transfer</li> <li>• Not a significant increase in costs with e-transfer usage versus cheque related costs in comparison to the time savings in providing funds to customers.</li> </ul> <p>Metrics will be developed to measure these Leading Indicators</p>																																		
<p><b>Non-Functional Requirements (NFRs):</b></p>	<table border="1"> <thead> <tr> <th></th> <th>Category</th> <th>Details of NFR</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Architecture</td> <td>Support Design/Solution of integration to/from source to enabler</td> </tr> <tr> <td>2</td> <td>Communication, Training &amp; Documentation</td> <td>Impact to adjuster role for additional steps with customer. Updates to training and procedures. Corp comms to knowledgenet, intranet and public website.</td> </tr> <tr> <td>3</td> <td>Implementation Approach</td> <td>Project management will facilitate the planning while the Operational Teams supporting the changes will be involved.</td> </tr> <tr> <td>4</td> <td>Information and Security</td> <td>Review and approval of e-transfer file data processed external to MPI enterprise (similar to cheque production process).</td> </tr> <tr> <td>5</td> <td>Integration</td> <td>Design/solution of integration to/from source to enabler. Support solution development and testing. Support implementation.</td> </tr> <tr> <td>6</td> <td>Legal</td> <td>Current Requirements do not require Legal</td> </tr> <tr> <td>7</td> <td>Operational Support Model</td> <td>Service desk process to support redirection of questions or issues. Support of technology issues within the process.</td> </tr> <tr> <td>8</td> <td>Organizational Change Implications (Roles, Responsibilities)</td> <td>Potential impact to adjuster role duties to enforce Business rules which would disqualify e-transfer payment in certain scenarios that cannot be system coded.</td> </tr> <tr> <td>9</td> <td>Vendor Management</td> <td></td> </tr> <tr> <td>10</td> <td>Other - Finance</td> <td>Finance is the sponsor, and the Finance support teams will be involved in [Redacted] changes, reconciliation requirements and any updates to existing reporting. Anticipated areas involved are: Financial batch processing support, Accounts Payable, undeposited funds follow-up, and Reporting.</td> </tr> </tbody> </table>		Category	Details of NFR	1	Architecture	Support Design/Solution of integration to/from source to enabler	2	Communication, Training & Documentation	Impact to adjuster role for additional steps with customer. Updates to training and procedures. Corp comms to knowledgenet, intranet and public website.	3	Implementation Approach	Project management will facilitate the planning while the Operational Teams supporting the changes will be involved.	4	Information and Security	Review and approval of e-transfer file data processed external to MPI enterprise (similar to cheque production process).	5	Integration	Design/solution of integration to/from source to enabler. Support solution development and testing. Support implementation.	6	Legal	Current Requirements do not require Legal	7	Operational Support Model	Service desk process to support redirection of questions or issues. Support of technology issues within the process.	8	Organizational Change Implications (Roles, Responsibilities)	Potential impact to adjuster role duties to enforce Business rules which would disqualify e-transfer payment in certain scenarios that cannot be system coded.	9	Vendor Management		10	Other - Finance	Finance is the sponsor, and the Finance support teams will be involved in [Redacted] changes, reconciliation requirements and any updates to existing reporting. Anticipated areas involved are: Financial batch processing support, Accounts Payable, undeposited funds follow-up, and Reporting.	
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2	Communication, Training & Documentation	Impact to adjuster role for additional steps with customer. Updates to training and procedures. Corp comms to knowledgenet, intranet and public website.																																	
3	Implementation Approach	Project management will facilitate the planning while the Operational Teams supporting the changes will be involved.																																	
4	Information and Security	Review and approval of e-transfer file data processed external to MPI enterprise (similar to cheque production process).																																	
5	Integration	Design/solution of integration to/from source to enabler. Support solution development and testing. Support implementation.																																	
6	Legal	Current Requirements do not require Legal																																	
7	Operational Support Model	Service desk process to support redirection of questions or issues. Support of technology issues within the process.																																	
8	Organizational Change Implications (Roles, Responsibilities)	Potential impact to adjuster role duties to enforce Business rules which would disqualify e-transfer payment in certain scenarios that cannot be system coded.																																	
9	Vendor Management																																		
10	Other - Finance	Finance is the sponsor, and the Finance support teams will be involved in [Redacted] changes, reconciliation requirements and any updates to existing reporting. Anticipated areas involved are: Financial batch processing support, Accounts Payable, undeposited funds follow-up, and Reporting.																																	

Delete sample form (page 1 & 2) before submitting EHS template to the LPM Intake page. Upload completed EHS template to the [LPM Intake Page](#) and complete the [WSJF Calculator](#) template.

**Note:** If changes are required to the document, locate the Epic Name from the “My Submissions” area, click “Edit”, locate the attachment to edit and click to open, click “Edit Document” and edit the save the document. Click the “Save” button at the bottom of the epic form.

## Lean Business Case for Total Loss Payment by e-Transfer

<b>Epic/Business Case Name:</b> Total Loss Payment by e-Transfer	<b>Epic Number:</b> 177639	<b>Business Case Number:</b> 2023-010
<b>Prepared By:</b> Kerry Skibinski, Consultant, Agile Program Management Office	<b>Business Case Owner:</b> Michael Gandhi, Corporate Controller, Corporate Controller Office	<b>Business Case Funnel Entry Date:</b> 07/07/2022
<b>Department:</b> Controllers Office	<b>Division:</b> Finance	<input checked="" type="checkbox"/> <b>Single Year Budget</b> <input type="checkbox"/> <b>Multi-Year Budget</b>

<b>Epic Funnel Entry Date:</b> 4/29/2022	<b>Epic Owner:</b> Dana Frazer, Director, Physical Damage Claims and Analytics	<b>Key Stakeholders:</b> <ul style="list-style-type: none"> <li>• Customers</li> <li>• Claims</li> <li>• Salvage</li> <li>• Finance</li> </ul>
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**Epic Description:** *(From Epic Hypothesis Statement. Then brief explanation of business need and describe final deliverable)*

**For** eligible customers/lienholders/(leasing) companies

**who** are owed monies for a Total Loss settlement, payment will be provided through eTransfer (Electronic Funds Transfer) to their bank accounts through

**the** MPI eTransfer service which

**is a** MPI controlled bank to bank mechanism of cash transfer

**that** eliminates the need for cheques/delays

**unlike** the current cheque based payment method used for Total Loss settlement payments that delay cash transfer and creates significant administration delays/costs

**our solution** provides a fast, cost effective and alternative payment method than a cheque issuance for transferring monies to customers/lienholders and companies eligible to receive an eTransfer payment.

This new Epic is dependent on the completed Business Case #21-04-e-transfer capability (also referred to as an e-transfer enabler) The e-transfer Total Loss Epic provides a source to use the e-transfer enabler not added scope to the e-transfer capability Epic. The e-transfer enabler is a generic service intended to support multiple sources as required. The planned solution closely aligns with the EFT and Cheque process where **[Redacted]** is utilized.

**Notes: Impacted Groups**

Initial assessments by the CARS support team indicates the e-Transfer Total Loss Epic is not needing updates to AOL. System changes to CARS, interface changes to **[Redacted]**, working with the **[Redacted]** Software product and process to create the secure e-transfer file and in addition updates to reconciliation processes in Finance are expected. Claims, Finance and FSS (Financial Systems Support) are Groups required to support the development and testing.

Corporate Strategic Initiative/Stream

Government directive

Other

**Brief description**

“Implementing e-Transfer within Total Loss, we will be able to significantly improve our Customer experience and ensure we can get money in hand of our Customers in a timely manner that does not create an impediment in their lives – Michael Gandhi”

**Business Outcome Hypothesis:**

The measurable benefits that the business can anticipate if the epic hypothesis is proven to be correct – leading to a reduction in cheques and increasing the effectiveness of cash delivery to our claimants/customers. The primary wins from e-Transfer are:

The primary project benefits include:

8. improved customer service through available options
9. improved customer service through updated technology
10. improved customer service through shortened duration between payment approval and receipt
11. improved operational efficiencies by eliminating the need for MPI to obtain and store bank account information used in the Direct Deposit process.
12. improved operational efficiencies and cost savings through bulk e-transfer option
13. improved system integration whereby customer/claimant e-transfer information can be leveraged
14. reduced costs of issuing cheques (printing, processing, mailing)

**Leading Indicators:**

- Customer NPS (Net Promoter Score)
- Decrease in cycle times for funds transfers for Total Loss using e-transfer
- Decrease in cheque related costs replaced by e-transfer usage
- Metrics will be developed to measure these Leading Indicators

<p><b>In Scope:</b></p> <ul style="list-style-type: none"> <li>• Update CARS to allow a new option for Total Loss payments by e-transfer.</li> <li>• Eligibility rules/requirements will be enforced by the Total Loss Adjuster.</li> <li>• Eligibility requirements will be defined by the supporting Business Unit(s) (Claims/Salvage).</li> <li>• System Capture and Total Loss Adjuster manually validates the Customers email required for the e-transfer processing.</li> <li>• Systematic and/or manual, financial reconciliation of processed and non-processed/expired e-transfer payments.</li> <li>• Next day processing of the accumulated e-transfers from the previous day.</li> </ul>	<p><b>Out of Scope:</b></p> <ul style="list-style-type: none"> <li>• Other settlement or reimbursement payments are not in-scope for the initial release.</li> <li>• The CARS system will not systematically determine if the Customer is eligible to receive a Total Loss Payment by e-transfer.</li> <li>• System validation of the customers email.</li> <li>• Storage of the Customers email in CARS or AOL.</li> <li>• Same day / immediate processing of an e-transfer payment request.</li> </ul>	<p><b>Nonfunctional Requirements:</b> <i>(See Epic Hypothesis Statement – that lists definition. In addition list the internal departments that need to be consulted to assess impact to implementation)</i></p> <ul style="list-style-type: none"> <li>• Information Security Office (Technical Review to ensure compliance to corporate policies/standards)</li> <li>• KMS and/or Claims teams to update existing documentation similar to Cheque requests but adjust for e-transfers.</li> <li>• Finance team reconciliation readiness.</li> <li>• KMS to support MPI Intranet and Public website updates of this new payment to Customer option.</li> <li>• <b>Regulatory Accountability</b></li> </ul> <p>Does this project require that any new legislation be introduced, or existing legislation be amended or repealed? (Acts or Regulations)  <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Does this project require that any new Policies and Forms (Regulatory Instruments) be introduced, or existing Policies or Forms be amended or repealed?  <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>If the answer to either question is Yes, the Regulatory Accountability Office must be consulted. The RAO must complete the following:</b></p> <p><b>Review Date:</b> MM/DD/YYYY  <b>Reviewer:</b>          This project is determined to be a “Regulatory Project” as per the Regulatory Accountability Act and must be coordinated with the RAO:  <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
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<p><b>Minimum Viable Product (MVP) Features</b> – <i>(early indicator – functional, working, in production and delivers value. Example is MS 365 and how basic functionality was created as initial MVP and plan is for features to be added – calendar (feature), file sharing (feature), etc.)</i></p> <ul style="list-style-type: none"> <li>• Update CARS to allow a new option for Total Loss payments by e-transfer. (No other settlement or reimbursement payments are in-scope for the initial release)</li> <li>• Capture the Customers email as input for e-transfer requests. There is no requirement to store the email in CARS, the email can be logged as part of the [Redacted] processing.</li> <li>• Next day processing of the e-transfer request (not immediate processing).</li> <li>• Customer challenge question unique to the Customer will be issued for each e-transfer.</li> </ul>	<p><b>Additional Potential Features</b> – <i>(building on the MVP – represents other features of lower priority and anticipated timing.)</i></p> <ul style="list-style-type: none"> <li>• CARS - Add systematic rules/logic to support eligibility requirements for Customers allowed to receive e-transfer payment.</li> <li>• CARS – Add ability to provide payments for other settlement / reimbursements.</li> <li>• CARS - Add ability to send e-transfer via SMS (requires e-transfer enabler feature to be available).</li> <li>• CARS – Add ability to systematically validate the Customers email and store the email with the Customer record (storing the Customer email may require AOL-IWS to be updated)</li> </ul>
<p><b>Analysis Summary:</b> <i>(Brief summary of the analysis that has been formed to create the business case. Outcome of discussion from Cadence meetings resulting from Epic Hypothesis Statement, and reference material (white papers), preliminary costing – benefits as part of the outcomes defined in the Epic Hypothesis Statement. Any proof of concepts that were completed – artifacts and research.)</i></p> <p>This e-payment option primarily benefits MPI’s external customers who, when requesting payment for their total loss vehicle claim, will have a faster option for receiving these funds. Currently we quote customers 3-5 business days as the time it takes for a cheque to be requested, printed, mailed and delivered. Subject to operational delays and weekends, it could be over a calendar week before the customer receives payment. With this new process, e-transfers will be processed at the same time as the daily cheque requests, allowing customers to receive payment within 24 hours.</p> <p>The customer also enjoys an easier process receiving the funds into their account as it can be done with a few clicks on their device, or in the case of customers with auto-deposit enabled, no action required.</p> <p>This digital transaction also eliminates some risk in terms of lost, stolen or delayed cheque payments.</p> <p>Internally, e-payment does not provide any operational efficiency gain as we are only adding options to an existing process, not eliminating any steps in Total Loss.</p> <p>There will be minor internal cost savings on postage and internal mail processing for eliminated paper cheques.</p> <p>The application of e-payment is expected to be limited to simple, single-customer payments. Joint-payments (ie. to customers and lien-holders such as banks) will not be eligible.</p>	<p><b>Milestones/Checkpoints</b> –<i>(Include milestone or checkpoint dates for MVP(s) start/completion if known)</i></p> <p>The work is expected to be planned out and potentially started within Program Increment 7 (July 18/22 – Oct 9/22) based on supporting teams' capacity and work prioritization in PI 7.</p>

<p>Cost Benefit section outlines the Customer from 2021 that were eligible and the associated savings. E-transfer does contain some risk in that email addresses can be input incorrectly and CARS does not have the ability to validate them.</p>	
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**Approval Request/Recommendation for LPM Committee:** *(Define the ask – resources, specific incremental funding based on detailed costing to be completed to support the recommendation.)*  
Approval is requested to implement e-Transfer as an option for Total Loss payments by Q3 of FY2022-23. Estimated total cost to implement is estimated at \$ \_175K\_ to be taken from \_\_LPM\_\_ funding envelope.

**Solution Analysis- (completed in collaboration with Solution Group – i.e. Epic Owner and APMO) The Cadence meetings will assist in this process with input from stakeholders**

**Which Internal and/or external customers are affected, and how?** *(Describe the user community and any markets affected)*  
Internal users - Total Loss adjusters who create payment requests will learn the new process. This is anticipated to be a seamless process to integrate into the existing workflow.  
External customers – will receive their payments much more quickly and with greater security. This will enhance the customer experience. Allowing the Corporation be in line with payment experiences offered by other digitized companies offering a similar service.

**What is the potential impact on solutions, programs and services?** CARS Front End system changes, updates to supporting interfaces between CARS and [Redacted], Claims processes supporting Total Loss settlements, [Redacted] processing of file containing e-transfer(s), Finance reconciliation processes, system and procedural updates by Claims and Finance teams. Updated process for Total Loss Adjusters to support new payment option.

**What is the potential impact on sales, distribution, deployment and support?** *(N/A)*

**Forecasted Costs – TO BE COMPLETED BY SOLUTION GROUP**

<p><b>T-Shirt Estimates</b> Medium \$100 - 250K</p>	<p><b>Details</b></p>
<p><b>MVP Cost:</b> <i>(What is the investment requested to fund the MVP (the MVP cost)? Include date of MVP cost estimate being requested. See completed MVP Estimating Costing Tool)</i></p>	<p><b>Estimated Implementation Cost:</b> <i>(What is the estimated investment (cost) of full implementation of the epic if the MVP hypothesis is proven true? This estimate is refined of over time)</i></p> <p><b>Initial estimate:</b> <i>(This can be expressed as a range)</i></p> <p><b>Refined estimate(s):</b> <i>(Identify material updates to the estimated implementation cost, usually informed from experiments. Include date of refined estimate. See completed Lean Implementation Estimating Costing Tool)</i></p>

September 12, 2023  
June 15, 2023

CONFIDENTIAL  
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MPI Exhibit #33  
2024 GENERAL RATE APPLICATION  
Part V – VA Appendix 20a - Redacted

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**Forecasted Returns**

**Type of Return:** *(Market share, increased revenue, improved productivity, new markets served, reduced risk, financial net present value etc.)*

**Development Strategy (completed in collaboration with Solution Group)**

**In-house or Outsourced Development:**  
In-House development. (Claims, Finance, FSS)

**Incremental Implementation Strategy:***(Epics are defined as a single whole, but each epic undergoes incremental implementation. Click [here](#) for details on potential strategies. i.e. Spike first, Some features first, Architectural epic first, vertical slice, concurrent/sequential implementation etc.)*

**Sequencing and Dependencies:**  
The e-transfer enabler Epic performs the e-transfer request processing. The work to complete the enabler is planned to be executed in PI 7 and may utilize the same groups or resources required to support the Total Loss Payment by e-transfer Epic.

**Risk Analysis**

**Risks/Obstacles of Proceeding with Project**  
*(A high likelihood of risk without sufficient planned action for mitigation may impact the discount rate used in calculating the Net Present Value of forecasted financial benefits. Impact to be discussed with VMO)*

Potential Risk	Likelihood	Severity	Description of Impact of Risk and description of planned action taken to mitigate this risk
Dependency on same groups / resources utilized within PI-7 .	<input checked="" type="checkbox"/> HIGH <input checked="" type="checkbox"/> MEDIUM <input type="checkbox"/> Low	<input checked="" type="checkbox"/> HIGH <input type="checkbox"/> Medium <input type="checkbox"/> Low	Competing work priorities and limited capacity will impede progress on this enabler with the risk of impacting an expected Q3 delivery. Consistent monitoring will need to identify potential risk triggers and re-allocate capacity where possible, refocus work on resources having capacity or assessing other work priorities with leadership to accept the risk or re-prioritize competing work.
Incorrect email captured by Total Loss Adjuster during the payment request process.	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	A manual process with the Total Loss adjuster to verify the email with the Customer is anticipated. Total Loss Adjuster sends test email to provided Customer email. Customer returns email. Adjuster speaks verbally with Customer to provide verification password/code or other. This is provided in the email exchange as a confirmation.
[Redacted] software requires vendor support.	<input type="checkbox"/> High <input checked="" type="checkbox"/> Medium <input type="checkbox"/> Low	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	FSS indicates potential vendor involvement from [Redacted] software to support the e-transfer file creation. This may result in additional costs which will be a Change Request.

Risks/Obstacles of NOT Proceeding with Project			
Potential Risk	Likelihood	Severity	Description of Impact of Risk and description of planned action taken to mitigate this risk
The existing process of Total Loss payment by Cheque will remain as the single choice.	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input checked="" type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	Customers needing a quick payment after a Total Loss will have to incur the time involved in processing a cheque and receiving via the mail.
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	

Assumptions	
<i>(What are you assuming to be true, or what conditions are you assuming will prevail that will make this achievable)</i>	
Cost Assumptions <i>(What sources were used to generate costs)</i>	
Cost/Benefit Assumptions <i>Actual CARS Payment Data from 2021</i>	Single Owners eligible for payments – Volume: 16,403 Cost to process cheques: \$20, 290.08 Calculated cost to process eTransfers next day: \$17,947.25 The higher per volume each / each year increases savings versus processing cheques. Cheque processing to reach the Customer is typically 3 days. e-Transfer payment would reach Customer within 24 hours.
Other Assumptions	

Alternative Solutions		
<i>(Describe at least two available alternatives that would achieve the project objectives)</i>		
Alternative 1		
Alternative 2		
Evaluation Areas	<b>Alternative 1</b>	<b>Alternative 2</b>
Benefits (Financial/Non-financial)		
Cost		
Risk		
Reason for not selecting this solution		

**Additional Supporting Data (completed in collaboration with Solution Group)**

**Attachments:** *(Other supporting documentation, links to other data, feasibility or trade studies, models, market analysis, etc., that were used in the creation of the business case)*

**Other Notes and Comments:** *(Any additional miscellaneous information relevant to LPM)*