



Help

# GLENN HERMAN

Methodologies and Services

# CORPORATE MISSION & VISION

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- **Mission - Strategic thinking coupled with implementation solutions for important problems; we put the interests of our clients in senior management first and foremost**
- **Vision - Develop a complex program management platform from which our clients can prioritize and control their technology portfolio, coordinate and manage their systems, and engage with all stakeholders**

# UNDERSTANDING THE BUSINESS CASE

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## Project Research

- Business Analysis**
- Collecting Requirements**
- Implementation Analysis**
- Vendor Selection**
- Technical Teams**

## Technical Feasibility Assessment

- Prototype Solution**
- Target Tools**
- Technology Selection**
- Technology Roadmap**

PRODUCT MARKETING

RESEARCH & DEVELOPMENT

SALES

OPERATIONS

BUSINESS OBJECTIVES

## Managed Implementation

- Phased Deliverables**
- 30/60/90 Day Targets**
- Enterprise Implementation**

## Operational Readiness

- Customer Requirements**
- Business Reengineering**
- Resource Availability**
- Capital Equipment**

# BUSINESS DEVELOPMENT LIFE-CYCLE

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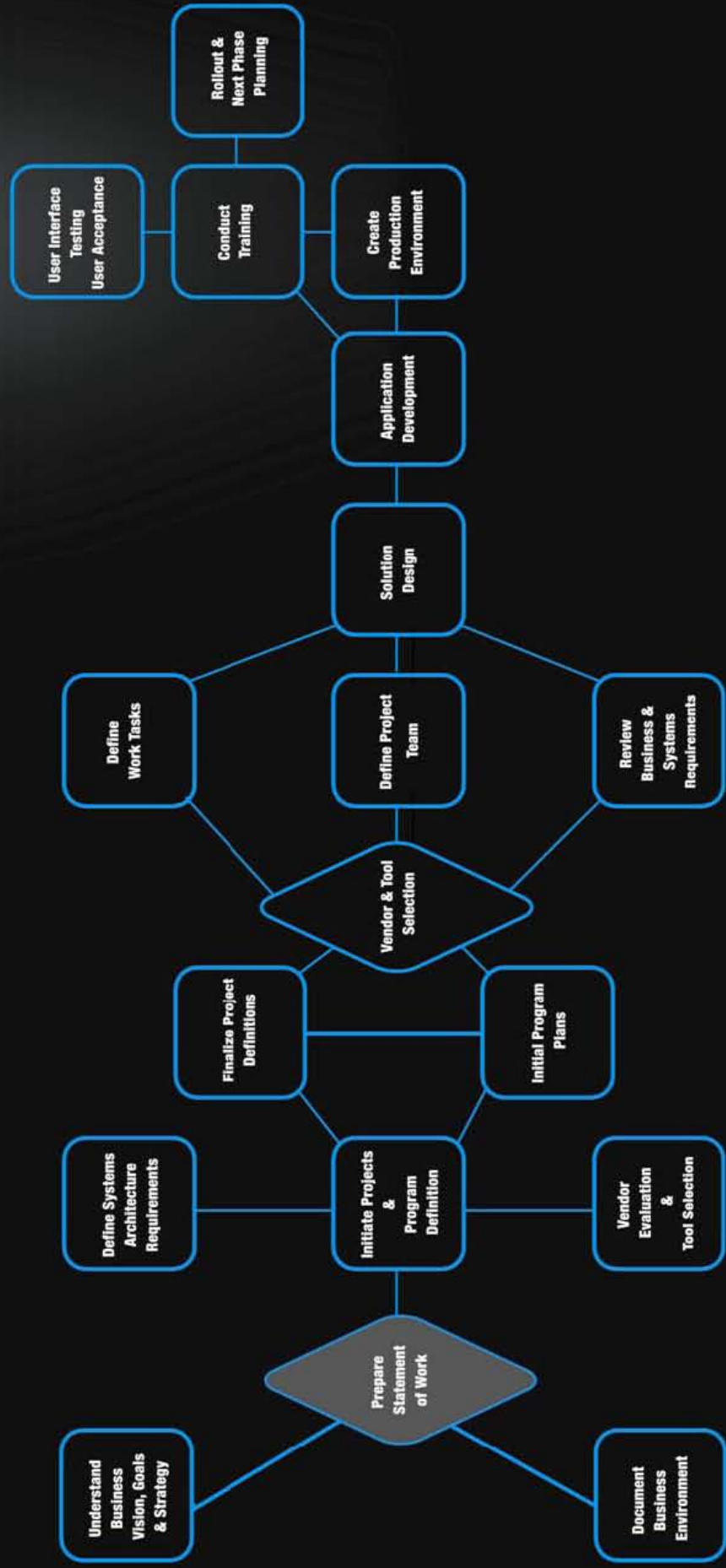


# PHASED APPROACH

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- **Project Definition**
- **Project Solution Design**
- **Project Organization**
- **Project Controls**
- **Project Maintenance**

# IMPLEMENTATION METHODOLOGY



# HIGH LEVEL CONSULTING SERVICES

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## PROJECT MANAGEMENT OFFICE

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- **Project Definition & Discovery**
- **Solution Design**
- **Customization & Development**
- **Validation & Training**
- **Production Acceptance**

## BUSINESS TRANSFORMATION

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- **Creating a Strategy**
- **Aligning the Strategy to Business Processes**
- **Aligning the Strategy to Organization**
- **Aligning Strategy to Technology Infrastructure**

## ENTERPRISE RESOURCE PLANNING

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- **Enterprise Resource Planning**
- **Financial Analytics**
- **Operational Analytics**

## CUSTOMER RELATIONSHIP MANAGEMENT

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- **Customer Administration**
- **Sales**
- **Customer Portfolio Management**
- **Performance Tracking**

## ENTERPRISE ARCHITECTURE

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- **Enterprise Capabilities**
- **Reference & Business Architecture**
- **IT Architecture**
- **Governance**
- **Strategic Gap Analysis**
- **Transition Plan**
- **Security Architecture**

# PROJECT MANAGEMENT OFFICE

Any endeavor in today's business environment requires a rigorous and formalized Program Management approach. A Program Management Office based on industry best practices ensures a successful outcome.

## PROJECT DEFINITION & DISCOVERY

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- Develop Statement of Work
- Define Scope & Schedule
- Define Implementation Strategy
- Define Success Factors
- Define Assumptions/Constraints
- Define Project Management Approach
- Define Change Management Approach
- Prepare Statement of Work
- Define Project Team Organization & Roles
- Core Team Training
- Steering Committee
- Review Business Operations
- Review Business Goals
- Review Business Process
- Define New Business Process
- Define Reporting Requirements
- Review System Requirements
- Determine HW, LAN/WAN, DBMS Requirements
- Data Conversion Requirements
- Define Scope of Customizations
- Define Interface Requirements
- Define Integration(s)

## SOLUTION DESIGN

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- Business Design
- Design New Business Policies Technical Design
- Design Applications Customizations
- Design External Interfaces
- Design InterApplication Integrations
- Design Training Plan, Materials and Facilities
- Design Test Methodology, Scenarios, and Criteria Documentation

## CUSTOMIZATION & DEVELOPMENT

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- Technical Development
- Develop Applications
- Develop Internal/External Interfaces

## (Customization & Development)

- Develop InterApplication Integration
- Develop User & Technical Documentation
- Develop Business Policies & Procedures
- Build System Test Database
- Build Training Database
- Perform Unit Test
- Perform Integration Test
- Perform Product (Alpha) Test

## VALIDATION, TRAINING & DEVELOPMENT

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- Perform Preliminary User Acceptance Test
- Rework Exceptions
- QA Review
- Validate Contingency Plan
- Perform Final User Acceptance Testing
- Conduct Training
- Users
- System Administrators Interfaces
- Create Production HW & SW Environment
- Build Configure & Validate initial database

## PRODUCTION ACCEPTANCE

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- Pilot Push
- Pilot Rollout
- Monitor Usage
- Perform Reviews
- Document & Make Adjustments
- Production Rollout
- Provide Direct Support
- Post-Implementation Audit
- Project Goals
- Customer Satisfaction
- Business Performance
- Systems Performance
- Implementation Process
- Ongoing Training Needs
- IT Systems Administration
- Ongoing Technical Support
- Present Findings to Customer



# BUSINESS TRANSFORMATION

Business Transformation / Process Improvement methodology is based on a comprehensive approach that addresses all areas needed to support a major change initiative. It is only with such an approach that transformation and improvement programs are successful in achieving their desired goals.

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## CREATING A STRATEGY

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- Validating strategy
- Establishing the vision for change
- Assessing business alignment
- Identifying keys to execution
- Developing a business transformation roadmap
- Defining the compelling business imperative
- Building stakeholder consensus and commitment
- Establishing strategic program management

## ALIGNING STRATEGY TO BUSINESS PROCESSES

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- Assessing process capabilities
- Aligning or redesigning business processes
- Aligning or redesigning organization architecture

## ALIGNING STRATEGY TO ORGANIZATION

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- Communicating the vision and imperative for change
- Aligning and designing the Organization Architecture
- Defining the required competencies to support new work processes
- Implementing an effective performance improvement program
- Aligning employee incentives
- Managing communication, change and progress

## ALIGNING STRATEGY TO TECHNICAL INFRASTRUCTURE

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- IT assessment and alignment
- IT portfolio review and management
- Establishing technical program management

# ENTERPRISE ARCHITECTURE

Enterprise Architecture (EA) is a framework or "blueprint" for how the organization achieves the business objectives at hand and in the future. The Enterprise Architecture looks at the key business, information, application, and technology strategies and their impact on business functions. Each of these strategies is a separate architectural discipline and Enterprise Architecture is the glue that integrates each of these disciplines into a cohesive framework.

## ENTERPRISE CAPABILITIES

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- **Strategic Direction**
- **Business Operational Concepts**
- **Capability Models**
- **Process Models**
- **Technology Scan**

## REFERENCE & BUSINESS ARCHITECTURE

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- **Business Events**
- **Process Definitions (Core Business, Key Business, & Elementary Business processes)**
- **Roles & Locations**
- **Organizational Structure**

## IT ARCHITECTURE

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- **Application Function Models**
- **Data Stores**
- **Enterprise Technology Framework**
- **User Groups**

## GOVERNANCE

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- **Principles, Policies, & Guidelines**
- **Decision Models**
- **Architecture Management Framework**
- **Technical Reference Models**

## STRATEGIC GAP ANALYSIS

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- **Infrastructure Gap**
- **IT Assessment**
- **Architecture Management Framework**
- **Architecture Review & Assessment**

## TRANSITION PLAN

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- **Transition & Sequencing Plan**
- **Transition Management**

## SECURITY ARCHITECTURE

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- **Identification, authentication, provisioning, and privacy**
- **Single sign on; secure data and services**

# ENTERPRISE RESOURCE PLANNING

Enterprise Resource Planning (ERP) is such a strategic tool, which helps the company to gain competitive edge by integrating all business processes and optimizing the resources available.

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## ENTERPRISE RESOURCE PLANNING

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- **Management Consolidation**
- **Balance Scorecard**
- **Risk Management**
- **Strategic Planning**
- **Value Based Management**
- **Financial Management**
- **Strategic Alignment**
- **Benchmarking**
- **Supply Chain Management**
- **Life-cycle Management**
- **Data Life-cycle Management**

## FINANCIAL ANALYTICS

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- **Financial Reporting**
- **Capital planning**
- **Capital budgeting**
- **Capital forecasting**

## OPERATIONAL ANALYTICS

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- **Procurement**
- **Inventory & Warehouse Management**
- **Manufacturing**
- **Transportation**
- **Sales**
- **Customer Services**
- **Program & Project Management**
- **Quality Management**
- **Enterprise Asset Management**

# CUSTOMER RELATIONSHIP MANAGEMENT

The idea of CRM is that it helps businesses use technology and human resources to gain insight into the behavior of customers and the value of those customers.

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## CUSTOMER ADMINISTRATION

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- Customer identification and authentication
- New customer set up
- Customer maintenance and service registration
- Contact Management
- Schedule contact events
- Record contact event outcomes

## SALES

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- Lead management
- Analytics
- Custom product engineering
- Deal/Facility agreement/pricing
- Credit deal/facility approval submission
- Deal closure (documentation/security taking)

## CUSTOMER PORTFOLIO MANAGEMENT

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- Deal status tracking (approval, product set up draw down)
- Customer profitability
- Customer risk management
- Adverse trends management
- Customer segmentation
- Account planning/service level definition

## PERFORMANCE TRACKING

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- Performance target review
- Performance target setting
- Customer surveys