



KONICA MINOLTA

8 STEPS

INITIAL ANALYSIS AND IMPLEMENTATION PLANNING FRAMEWORK FOR YOUR STRATEGIC PROJECTS

Konica Minolta IT Solutions Czech
Business Consultation

KONICA MINOLTA IT SOLUTIONS CZECH



Co-Sell ready Gold Partner
Co-Marketing Ready Gold Partner

Microsoft
Partner



Gold Enterprise Resource Planning
Gold Windows and Devices
Gold Data Analytics
Gold Data Platform
Gold Datacenter

Silver Small and Midmarket Cloud Solutions
Silver Cloud Business Applications
Silver Collaboration and Content
Silver Cloud Platform
Silver Messaging



Automotive CRM
Fleetman
Quick Sums

By Konica Minolta IT
Solutions Czech and
Dynamics 365



2016 PRESIDENT'S CLUB
for Microsoft Dynamics

2014 Microsoft Dynamics
Reseller of the Year Finalist
Central and Eastern Europe

Microsoft Awards
2016 **Winner**

Microsoft Awards
2019 **Finalist**
Czech republic



> 200 EXPERTS



PROJECTS IN 5 COUNTRIES



360 mil CZK
YEARLY NET SALES

Microsoft
FastTrack
TEAM

YOUR OUTLOOK FOR STRATEGIC IT PROJECT IS NOT GREAT

>55%

OF IT PROJECTS FAIL

ACCORDING TO VARIOUS ESTIMATES
FROM GARTNER, IDC, IBM ETC.

THE LARGER THE PROJECT
THE HIGHER THE PROBABILITY OF FAILURE

UNCLEAR OBJECTIVES

UNREALISTIC SCHEDULE

UNALIGNED TEAM, LACKING COMPETENCE

SHIFTING PRIORITIES

WHAT IS 8 STEPS

INITIAL ANALYSIS AND IMPLEMENTATION PLANNING FRAMEWORK FOR YOUR STRATEGIC PROJECTS THAT:

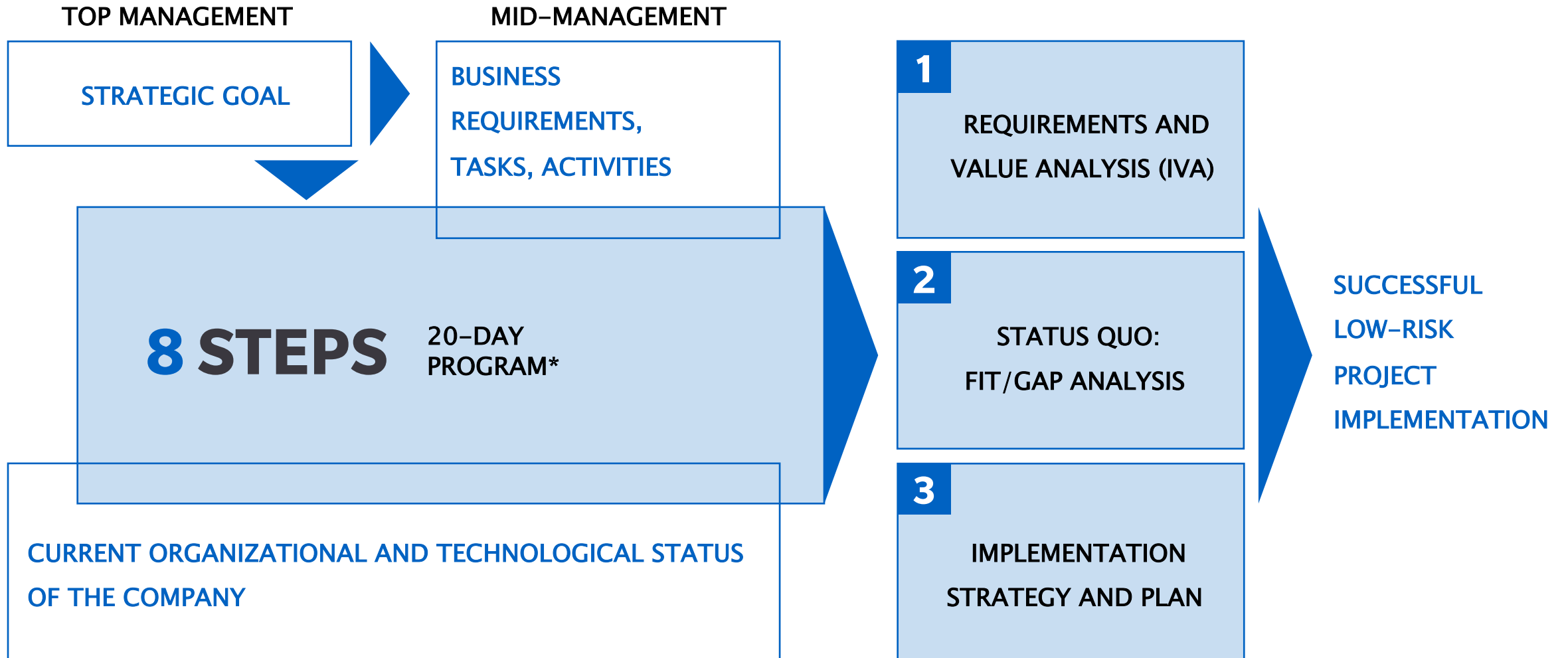
ELIMINATES RISKS

CREATES PRECISE PLAN

DISCOVERS GAPS BETWEEN STRATEGIC GOALS AND CURRENT CAPABILITIES

INCREASES PROBABILITY OF SUCCESSFUL AND PROFITABLE IMPLEMENTATION

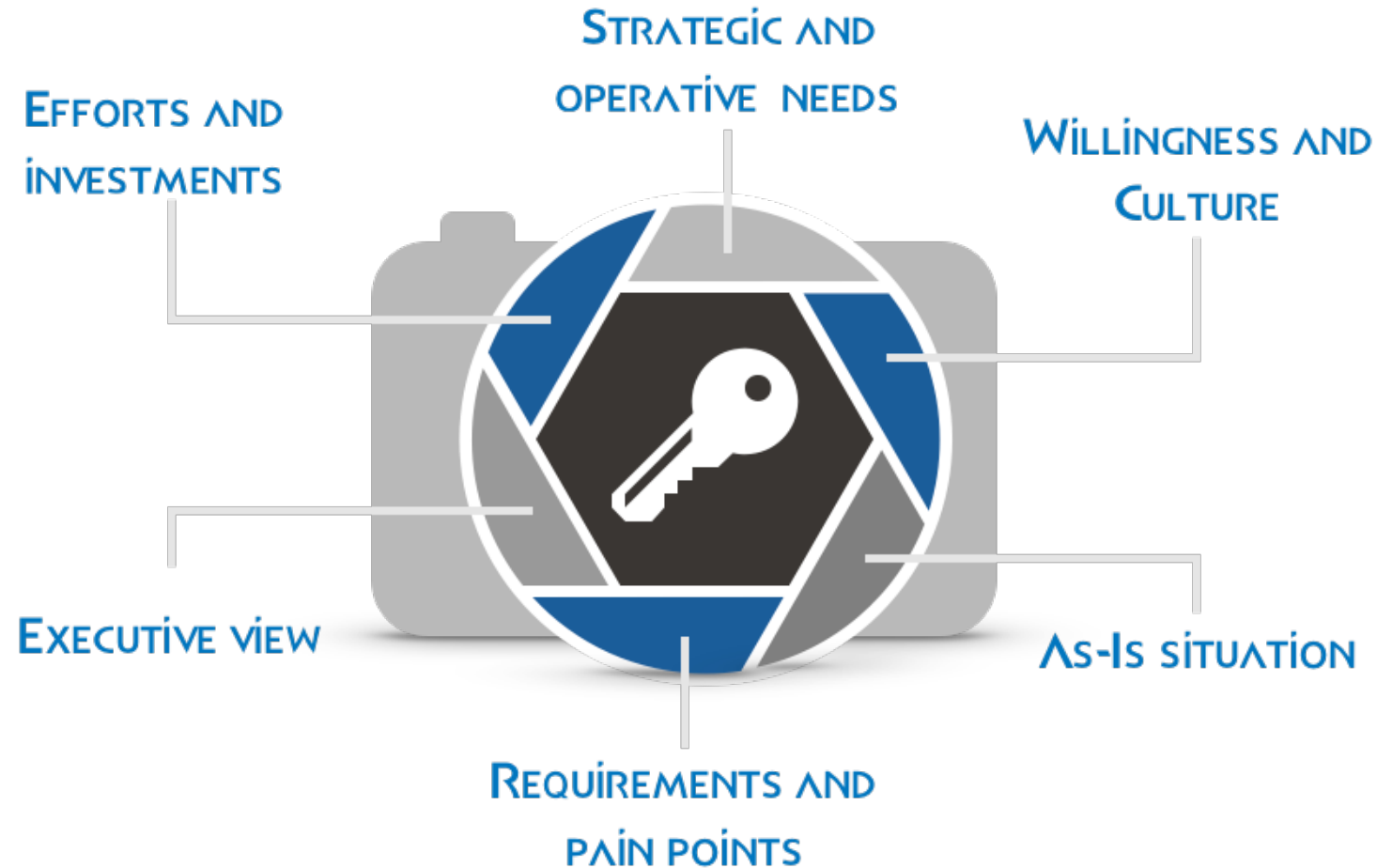
WHY AND WHEN DO YOU NEED 8 STEPS



* Typical duration of the program. Actual length varies, depending on complexity of the project and level of customer cooperation

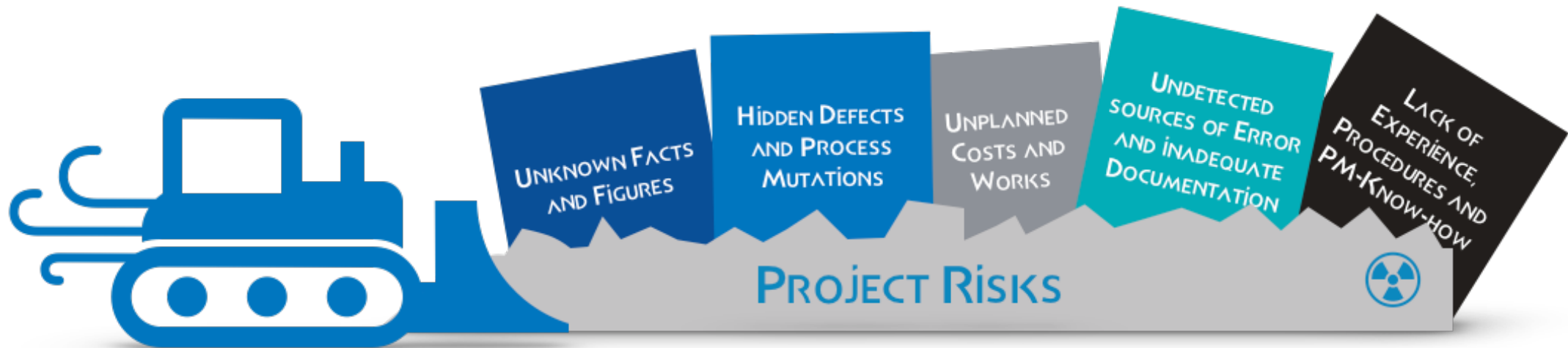
AN ORGANISATIONAL SNAPSHOT

In addition to the technical aspects, we pay attention to all sorts of relevant planning and success factors



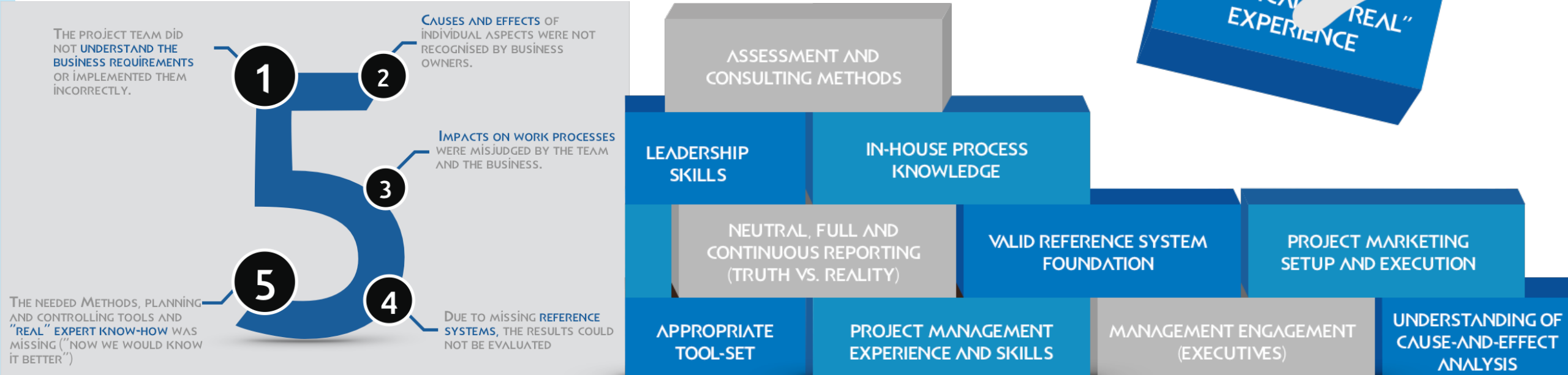
RISK MITIGATION WITH 8 STEPS

Thanks to meticulous, complex analysis of status quo compared against strategic goals and business requirements we identify the usual project risks and move them out of your way



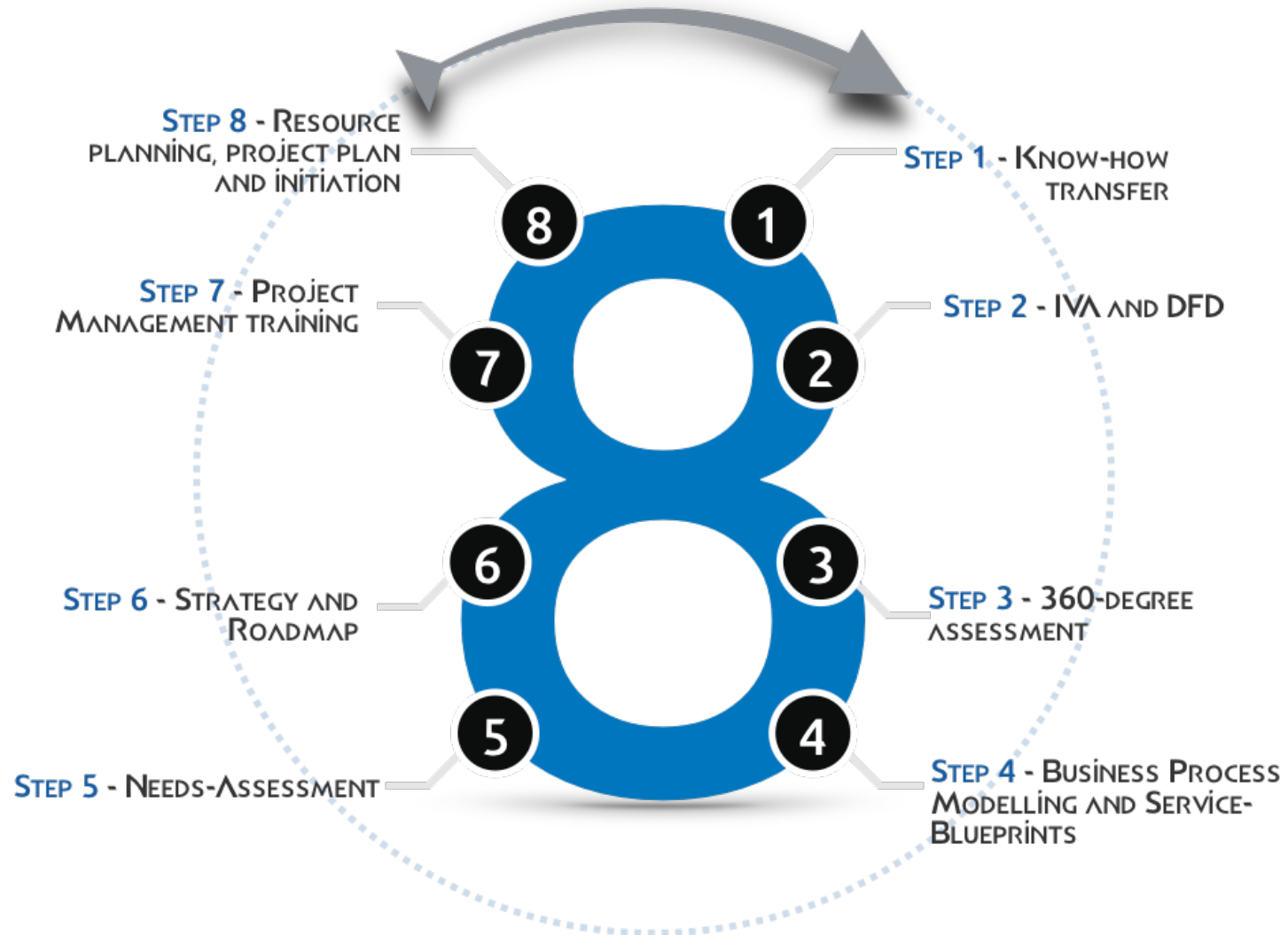
THE FOUNDATION FOR SUCCESS

Project success depends on a solid foundation – clarity and preparation before the project starts. That is the focus of **8 STEPS** initial analysis



8 STEPS ITINERARY

A holistic method that has proven itself over years and ensures the success of your project



8STEPS

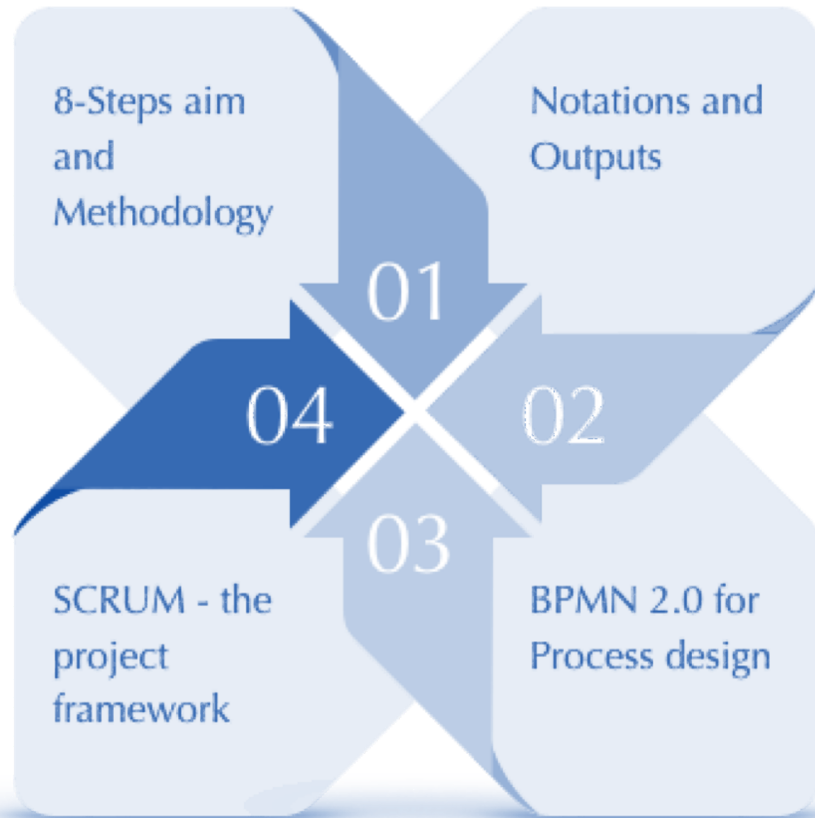
Step-by step description



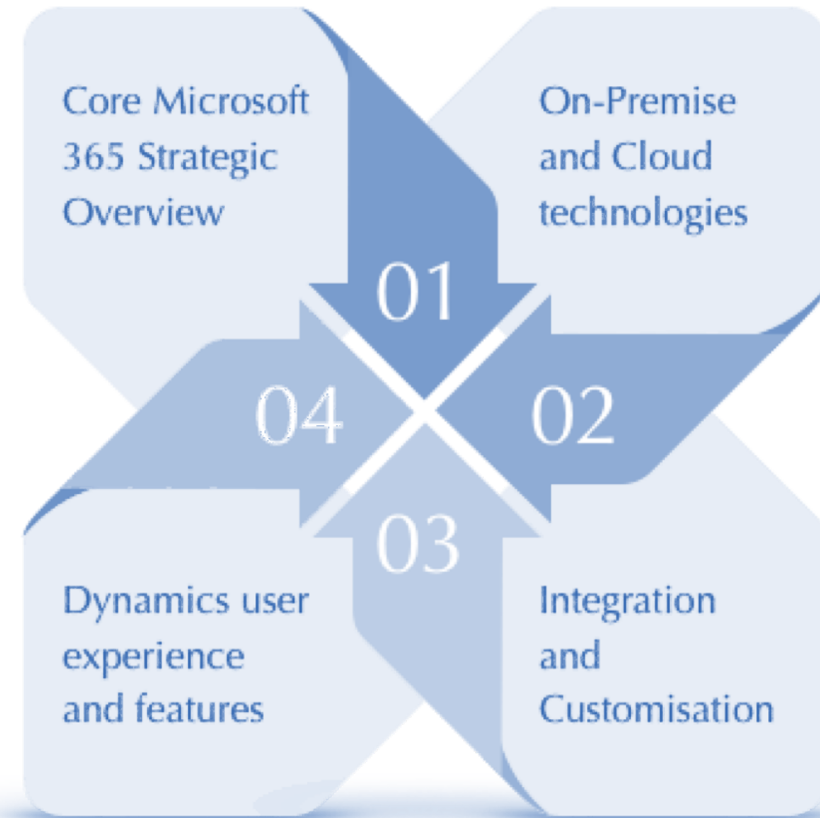
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KNOW-HOW TRANSFER (STEP 1)

Before we start with the actual project work, we carry out specialized training to ensure a consistent level of knowledge across the implementation team



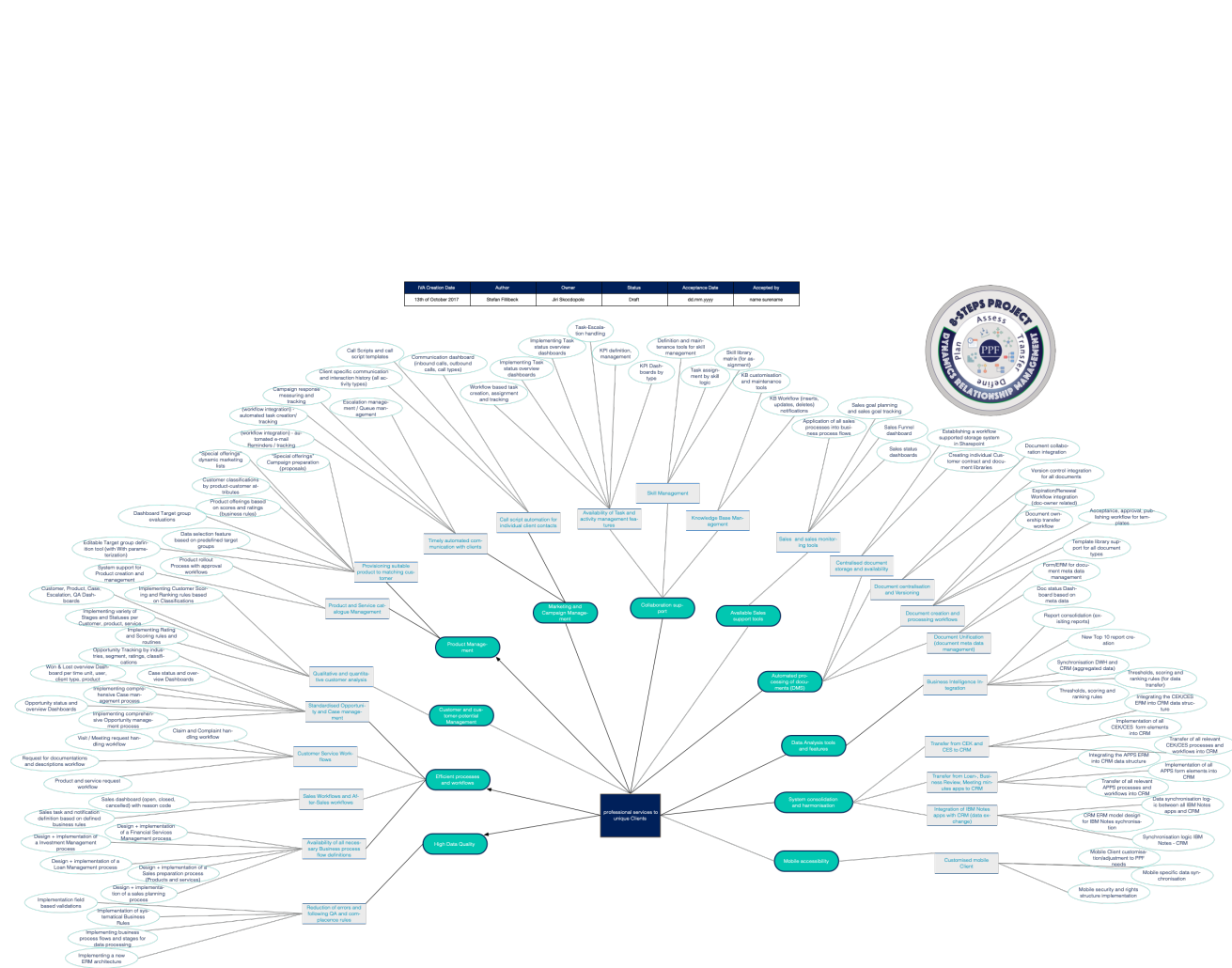
Training 1



Training 2

IMPACT VALUE ANALYSIS (STEP 2: IVA)

A workshop with the management to identify the business requirements and strategic goals



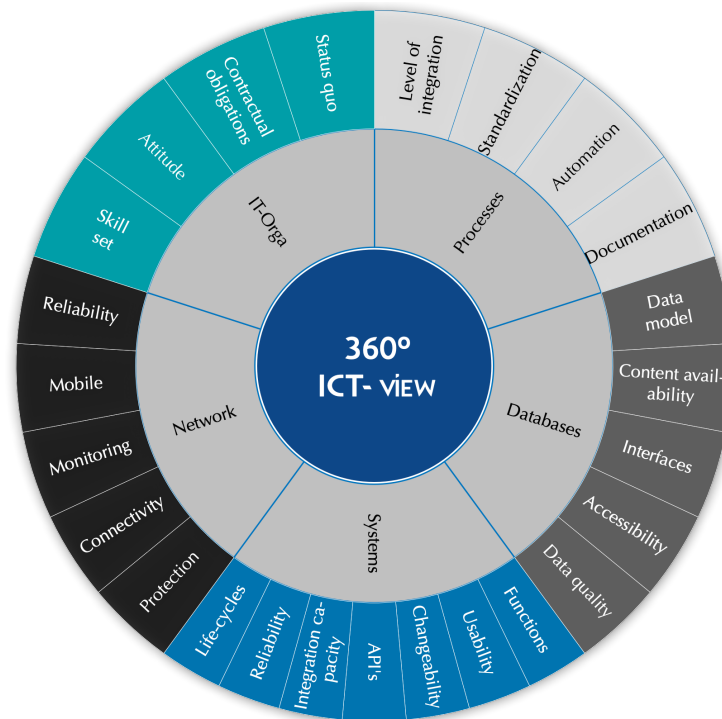
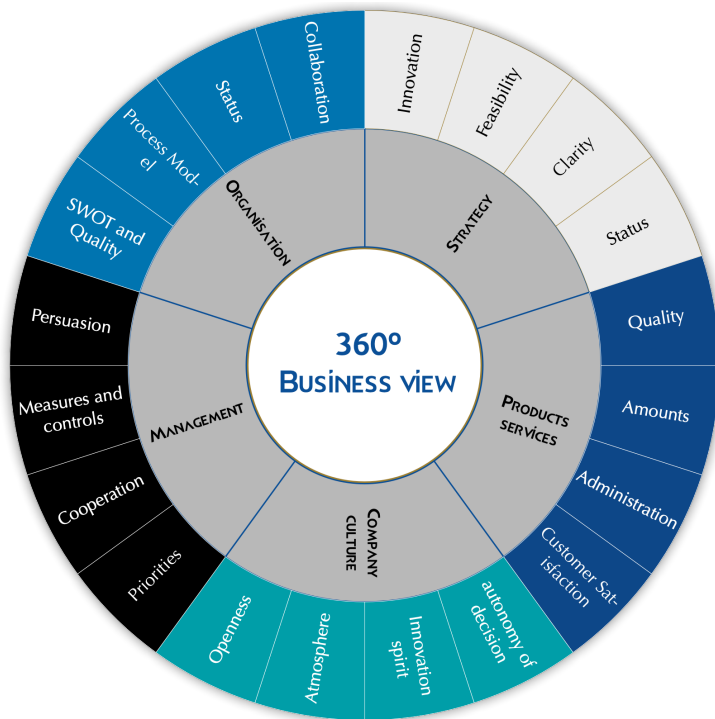
IVA PBI Example.ppt

General IVA Functions and Features

CRM Functionalities	UI / UX	Release	Workflow	General Requirement	Development	Standard	Yes	No	
Status identification The capability to identify Accounts/Contacts, Account/Contact groups based on defined Status fields. Capability to identify Suppliers/Supplier groups based on defined status fields. Possibility to select, extract subsets of Accounts/Contacts.	UI / UX	1-2 Days	Release 1.0	Workflow impl.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Quick guidance This feature will be covered by implemented Workflows and the Business Process flow features.	UI / UX	No additional	Release 1.0	General Requirement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No
Financial status management Financial statuses are depending on the data model and the integration strategy of SRM. Depending on which financial data will be available in SRM the standard features like AdvancedFind and Dashboards can be used to select and display financial data. Dashboards can be pre-defined and implemented based on the CRM design.	Dashboards / Reporting	1 Week	Release 1.0	Customisation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
ISO readiness ISO readiness will result out to the process and Workflow automation for the Onboarding 1 in Release 1.	Others	No additional	Release 1.0	General Requirement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No
Bundling of suppliers Suppliers and any other data entity can be "bundled" or selected with different tools to select sets and sub-sets of supplier selections. Advanced finds can be pre-defined and stored for utilization of users and user groups.	Others	1-2 Days	Release 1.0	Customisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
Categorisation and classification of suppliers The categorisation and classification are relevant in 2 areas. Classifications KM classifications and categorisation based on the cooperation with suppliers.	Category / Classif.	3-4 Weeks	Release 1.0	Development	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Knowledge base integration KB is a standard module of Microsoft Dynamics CRM. The content to be shown in the KB has to be decided and populated by KM.	Others	1-2 Days	Release 1.0	Customisation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Multi lingual content management The SRM System will be "English Only". The content can be keyed and stored in all languages. There might be limitations within the Database as such for some languages like Arabic, Chinese. This has to be clarified.	System setup	1-2 Days	Release 1.0	Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Pricing information Pricing information is strictly depending on the future data model and which price information/Price lists Catalogues are available to integrate into SRM. Defined documents (price lists, catalogues) as flat files can be handled at any other document or document template in SharePoint.	Others	No additional	Release 1.0	Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Information collection and validation Standard based on the defined data model, plausibility checks and validations.	Others	No additional	Release 1.0	General Requirement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes
Stakeholder engagement The overall engagement of Stakeholders, business owners and supplier contacts is managed by the applied workflows and standard features of Microsoft Dynamics CRM.	Others	No additional	Release 1.0	General Requirement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No
Vendor communication Communication can be managed by standard CRM features (e-mail integration) and automated workflows as defined in the BPMNs.	Communication	No additional	Release 1.0	General Requirement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No
Vendor identification and management Vendors, Suppliers, Business Owners, Requestors can be identified based on specific fields to be implemented into the data model of SRM. Important is that it is implemented as 1:n relationship in the data structure as every account and contact can have several positions.	Account / Contact management	1 Week	Release 1.0	Development	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Vendor invitation and tracking Inviting vendors will be based on a data selection and the transfer into a "Marketing list". Based on standard features an invitation can be send out either as document or an invitation e-mail via mail merge (mail letters).	Surveys / Campaigns	1 Week	Release 1.0	Standard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes
KPI management Key Performance Indicators are either a reporting (time frame) or Dashboard feature (status quo DB). The formulas for the calculations have to be applied.	Dashboards / Reporting	2 Weeks	Release 1.0	Development	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Compliance management The SRM compliance management will be based on Internal guidelines on self-commitment that can be applied and checked by a software system. The guidelines have to be defined as a kind of business rule that will be checked during the main workflows like "Onboarding 1-2, RFx processing, Vendor Evaluation". Legal, ethic or cultural arguments are included. SRM will not cover the features of a certified CMS system based on ISO or other official regulations.	Others	2 Weeks	Release 1.0	Development	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
Result sharing Sharing of results through Dashboards, Advanced Finds, Generated Reports is supported.	Dashboards / Reporting	No additional	Release 1.0	Standard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No

360-DEGREE ASSESSMENT (STEP 3)

This assessment creates clarity and transparency for our customers

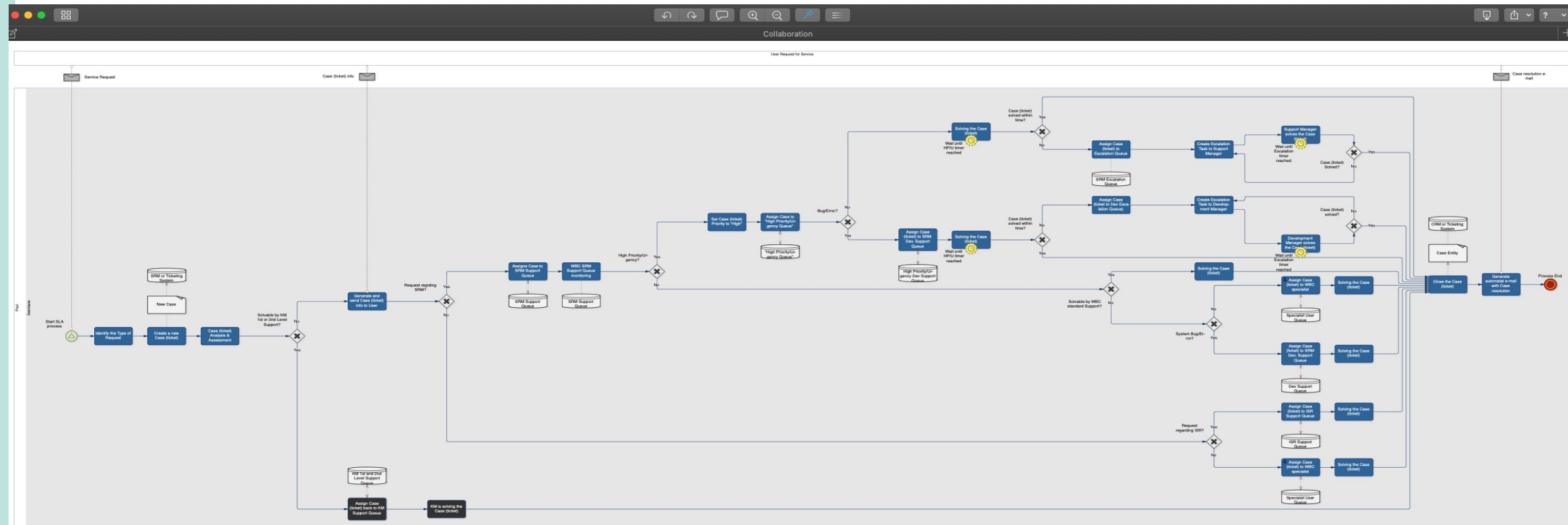


The screenshot shows an Excel spreadsheet titled "Supplier and cooperation partner and institutions integration". The table contains a detailed assessment of various business processes, categorized by Business, Risk, and Present risk. The table includes a legend for risk levels and a circular logo for "360° BUSINESS VIEW".

Business	Risk	Present risk
General CRM strategy	48	27
Supplier and cooperation partner and institutions integration	84	16
Business process based on management business model	24	4
Business process based on management business model	36	16
Business process based on management business model	12	3
Business process based on management business model	24	12
Business process based on management business model	48	14
Business process based on management business model	36	27
Business process based on management business model	72	12
Business process based on management business model	60	12
Business process based on management business model	120	62
Business process based on management business model	84	59
Business process based on management business model	72	6

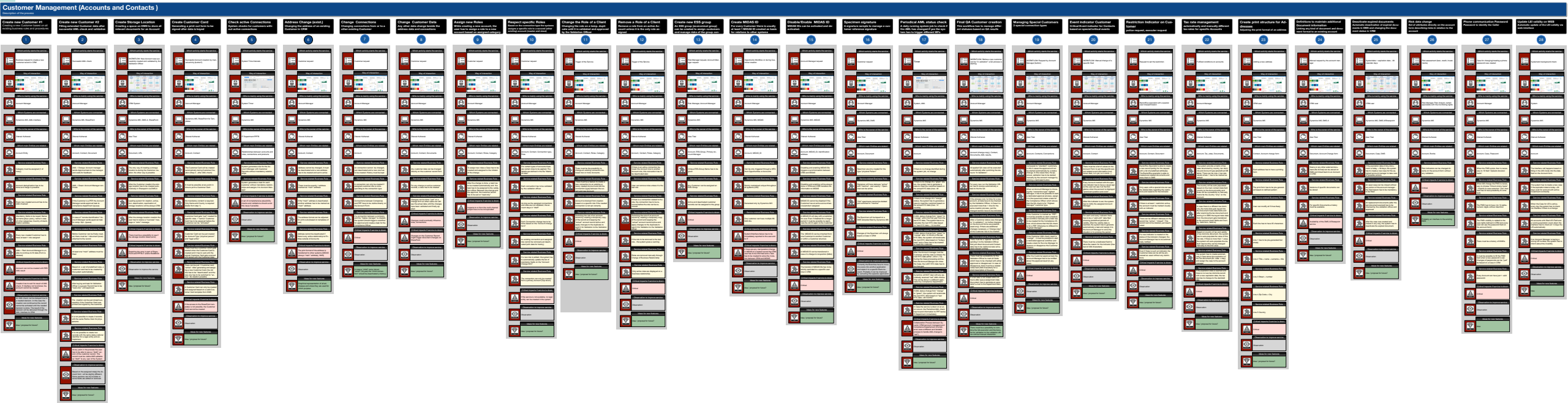
BUSINESS PROCESS MODELLING (STEP 4)

In this phase, we analyse and document all project-relevant processes and workflows



OUTPUT BASED ON THE BPMN

Another relevant result of the process documentation are service blueprints



RESOURCE NEEDS ASSESSMENT (STEP 5)

The Needs Assessment provides a detailed overview of the expected efforts

Needs Assessments

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CRM Implementation

Needs Assessment

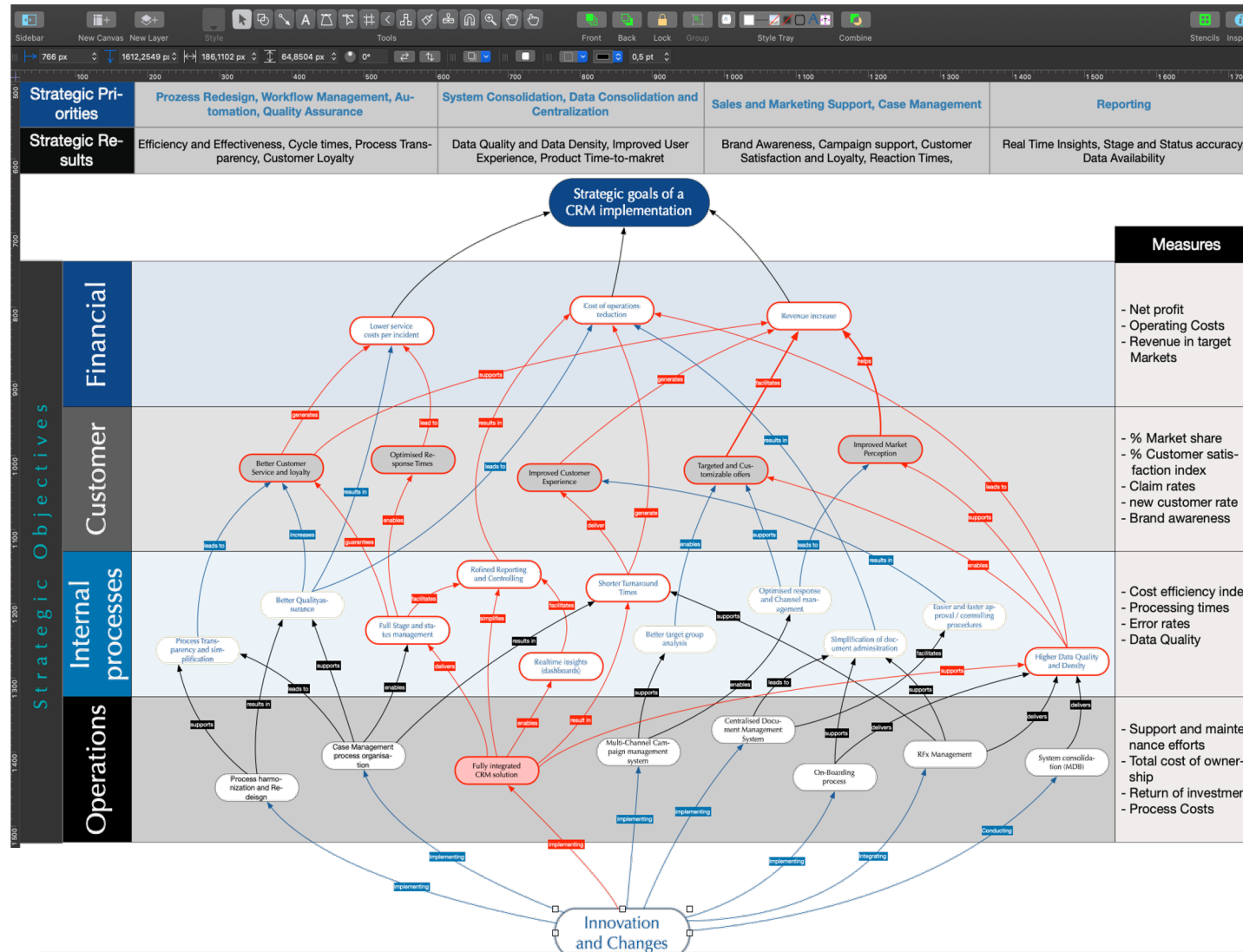
Customer Name:	XYZ Bank		
Document status:	Proposed	Project name:	XYZ Bank CRM
Created by:	Stefan Fillibeck	Project Manager:	Stefan Fillibeck
Approved by:		Function:	
Last modified by:		Distribution list:	
Date printed:			
Project areas and estimated points			Overview
Business Analysis			140
Technical infrastructure			90
Process and Workflow design			215
Customizing / development			540
Training and rollout			70
Project Management and organization			200
Other needs and efforts			50
			1305

Points: 1=4h, 2=1d, 5=1d to 2d, 10=3d to 5d, 20=1w to 2w, 50=2w to 4w, 100 =1m to 2m, 200 =2m to 3m **130**

Project area:	Business Analysis		
Abstract:	In this section of the document are all needed tasks and activities described and rated by the estimated effort. The business analysis focuses on all activities to be done to describe the current business model and the activities needed to transform the processes and workflows to the new CRM system.		
Story:	Many of the Business Analysis work has been done during the initial 8-Steps project during October till November 2017. Additional BA tasks and activities are described in the table below		
Created by:	Stefan Fillibeck	Source:	8-Steps Project
Creation date:	13.12.2017	Story-ID:	PPFB_BA
Type of need:	PM, Solution Architect, CRM Consultant	Priority:	
Needs:	Need descriptions		Points
High level activities:	1	New Business Prozess design for the new CRM environment (BPDs, NSDs)	20
	2	Collecting existing and creating all business rules, validations to be applied to the CRM solution including system interactions	20
	3	Service Blueprint creation	20
	4	CRM GDPR process design (BPD, NSD)	20
	5	Data Flow Diagrams for new solution	10
	6	Business rule collection and definition for all processes and workflows	10
	7	Escalation and exception handling for all processes and workflows	5
	8	Customer Service Process modelling (BPD, NSD)	5
	9	Sales process modelling (BPD, NSD)	10
	10	Other related documentations	20
Points: 1=4h, 2=1d, 5=1d to 2d, 10=3d to 5d, 20=1w to 2w, 40=2w to 4w, 60=1m to 2m, 80=2m to 3m			140

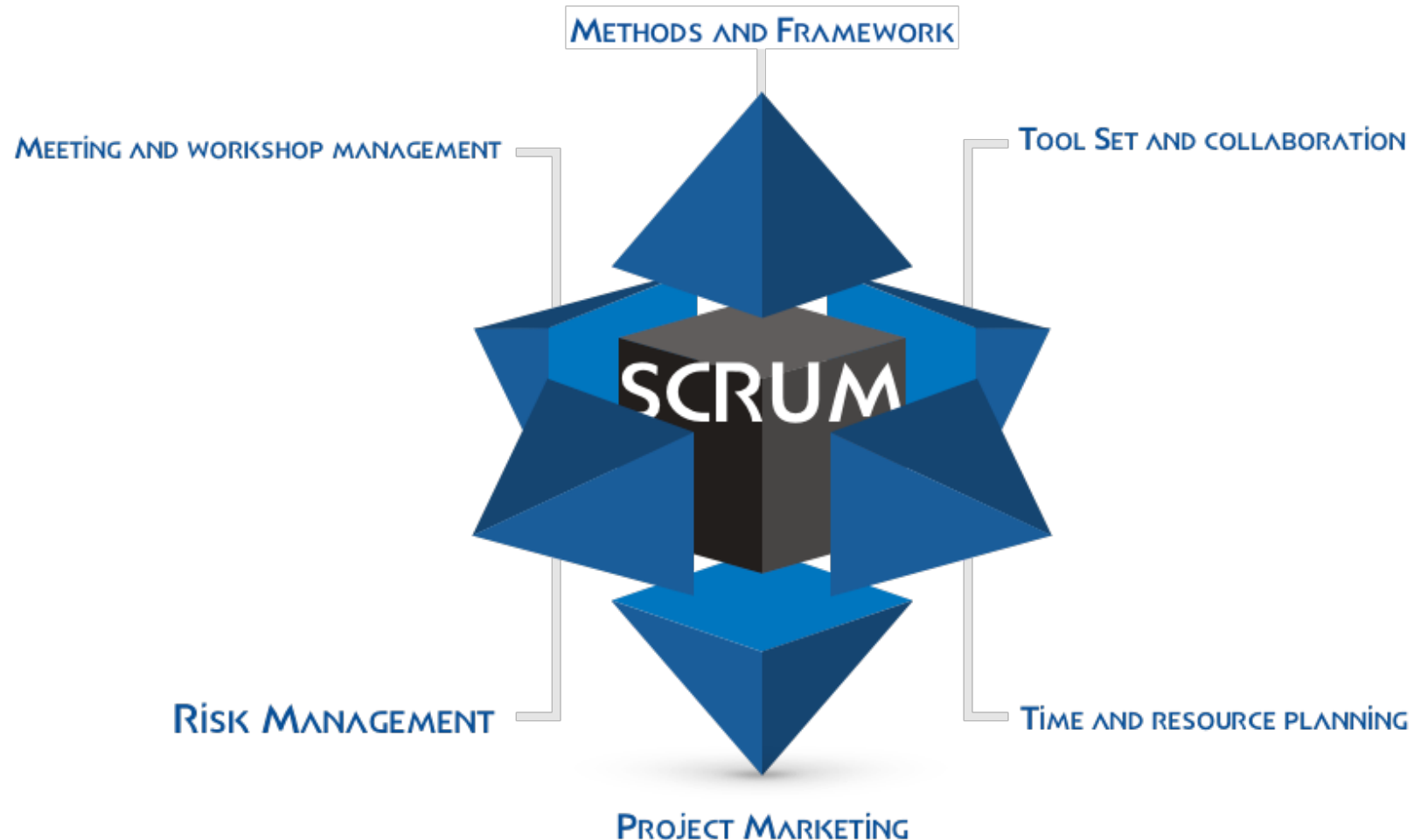
STRATEGY AN ROADMAP CREATION (STEP 6)

Based on the data and information collected, we define a strategy together with our customers



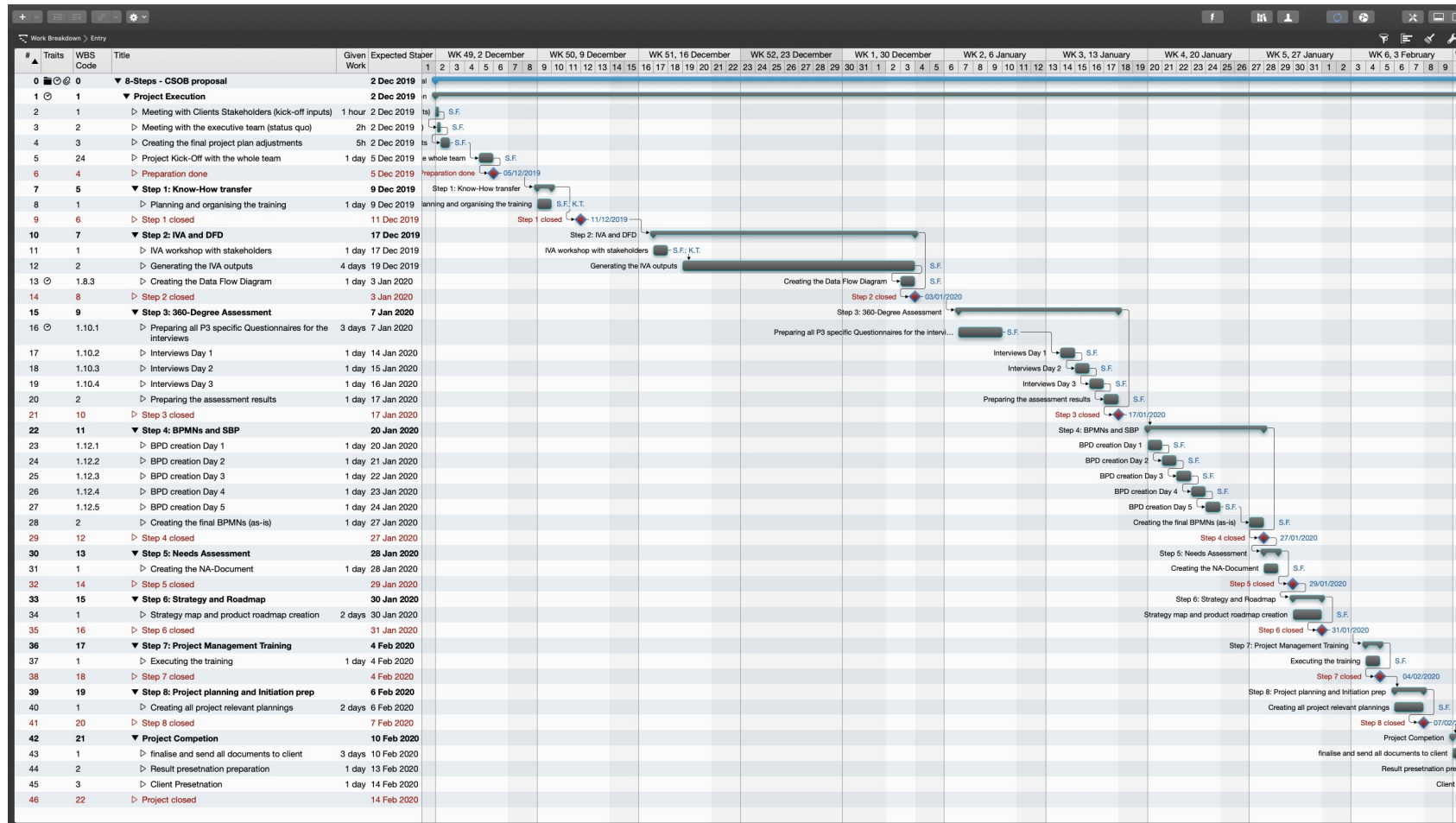
PROJECT METHODOLOGY TRAINING (STEP 7)

Detailed training of the future project team in Project Management and SCRUM



PROJECT PLAN CREATION (STEP 8)

Based on the knowledge gathered and analysed in previous steps, we provide a detailed project activities and resources (costs) plan



LIST OF DELIVERABLES

Customized documents handed over at the end of the **8STEPS** process constitute detailed blueprint for the success of your strategic project

- ❑ Training materials
- ❑ IVA and conclusive outline based on the IVA
- ❑ Data flow-Diagrams
- ❑ Business Process Models based on BPMNs
- ❑ Service Blueprints *(based on the given foundation)*
- ❑ Nassi-Shneiderman diagrams *(based on the given foundation)*
- ❑ 360-degree assessment results
- ❑ Needs-Assessment documentation *(effort estimate)*
- ❑ Strategy map
- ❑ Product development roadmap *(depending on the future project type)*
- ❑ Project and Resource plan
- ❑ Weekly project reports
- ❑ Final Result-Presentation



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