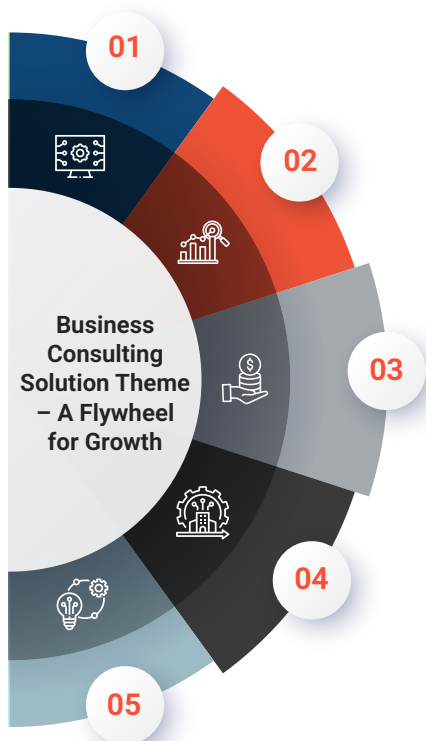


# Consulting Strategic Assessment

## Creating a Technical Vision and Roadmap to Support Corporate Strategic Objectives

Any successful journey needs to begin with a plan and a map to ensure you arrive at your destination on time and with the needed resources. Our approach to technology planning begins with an understanding of where the business intends to go and then focuses on the readiness of departments and staff to successfully make that journey. Technical planning occurs throughout this process, but can truly take shape once the end state, people, and process have been defined. Our recommendations span the entire enterprise and as plans and strategies evolve, our technology planning methodology considers these changes to ensure IT is effective, efficient, and nimble.

## Synoptek’s Unique “Envision” Methodology



### 01. From Business to Technology

- Business strategy informs and drives changes to business models and processes
- Changes to business models and processes drive changes to business technology/ systems
- System changes drive data capture and information collection
- Information enables business analytics
- Business analytics and results inform business strategy

### 02. Traditional Analysis

- Pain areas and business requirements are gathered from stakeholder feedback across departments & business functions
- People from the depth and breadth of the organization are engaged and their reactions to business strategy are noted
- Problems/ impediments are identified across application portfolio, data model, and process landscape which influence designs

### 03. Focus on Business and Persona

- People deliver strategy and people are at the heart of technical solutions
- Technical strategy envisions how personas work and interact in the future model, and those needs are included in planning
- Interaction, collaboration, and process modeling require an eye toward future needs and constraints to avoid costly “redo”

### 04. Digital Transformation

- Business models scale vertically into new sectors and horizontally into new channels
- Data-driven operations inform the entire organization on priorities and results
- Flexible business models allow adaptation as data-driven operations inform performance
- Understanding of objectives and customer trust enables a discussion on how best to apply advanced technology

### 05. Technology as an Enabler

- Technical debt is considered in both long-term and short-term perspectives
- Planning for updates and trade-outs during initial planning to avoid costly “timeout”
- Technology serves the business (not the opposite)

## Our Analysis of Stakeholder Pain Areas / Requirements

**29% Application Portfolio**

- Legacy applications unable to support strategic goals, lack of automation requiring labor to compensate, and investment on applications but only using a fraction of functionality.

**82% Data**

- Manual processing of data to prepare for analysis, lack of alignment across departments on definitions and data quality.

**80% Process**

- Lack of integrated processes across departments, unclear application functionality, and legacy applications that don't support automation.

**Requirement Heatmap**

	Stakeholder Perspective	Strategic Importance
Process Optimization and Automation	Critical	Critical
Data Management and Insight	Critical	Critical
User Experience	Important	Important
Integration	Important	Critical

2/2/2023

**Key Imperatives**

- Automate repetitive functions using out-of-the-box functionality and application integration.
- Use cross departmental process mapping, role-based access, or out-of-the-box automation/integration tools before developing in house.
- Utilize more functionality from fewer applications to reduce integration and reconciliation efforts.
- Deploy a centralized data hub with role-based access to enable data driven informed decisions, and common view of collected data.
- Ensure that data integration is included in process flows to ensure all systems are integrated. Reduce data integration complexity (Riptide) and focus on data enrichment within fewer applications.
- Employ user-centric design and testing (day-in-the-life) during analysis and testing phases.
- Utilize governance and change management to keep all parties aligned and ensure all staff know new roles as projects are implemented.
- Include a robust communications program to ensure everyone is aware of decisions and changes.

## Recommendations & Integrated Timeline

Business Objectives	Strategic Actions	Strategic Roadmap			
		2/2023	3/2023	4/2023	1/2024
<b>Business Foundation/Optimization</b>	<ul style="list-style-type: none"> <li>Implement MS Dynamics &amp; KJ by fiscal year end</li> <li>FRP Phase 2 (Automation &amp; Integrations/ CRM Intg)</li> </ul>				
<b>Customer Growth/Retention</b>	<ul style="list-style-type: none"> <li>Customer Case into CRM Service module (Phase 1)</li> <li>Migrate Markets functions into CRM</li> <li>Customer Care CRM Phase 2</li> <li>Experience most during event sign up</li> </ul>				
<b>Engaging customer experiences</b>	<ul style="list-style-type: none"> <li>Deploy new MyAccount (SSO)</li> <li>Design MyCPI architecture</li> <li>Event Mgmt Skills in MyCPI</li> </ul>				
<b>Data Driven Operations</b>	<ul style="list-style-type: none"> <li>Tablet content business language</li> <li>Integrate ERP, CRM, and CEP into DW</li> <li>Role based access to information portal</li> </ul>				
<b>Mitigate Risks/Ensure Ongoing Success</b>		<ul style="list-style-type: none"> <li>Implement Technology Governance process to ensure all key initiatives deliver to plan</li> <li>Utilize managed services for support (HRIS)</li> </ul>			
<b>Key Dependencies &amp; Risks</b>		<ul style="list-style-type: none"> <li>Overlapping timelines and cross functional dependencies will require consistent decision making and communications</li> <li>System automation will require new skills and different levels of training</li> <li>Consider the user of temp resources for backfill of key project staff</li> </ul>			

## Persona Driven Transformation

Key Persons	Key KPIs*	Role(s)	Needs
<p><b>Sales, Marketing, Customer Care</b></p>	<ul style="list-style-type: none"> <li>Self-through Rate, Lead Conversion Ratio, Active Customers to Total, Lifetime Cost Value</li> <li>Learner Retention / Growth</li> <li>Campaign to SQL, Cost of Lead Acquisition</li> <li>Case Closure/ Closed First Call/ Self Help Closure Rate, NPS Score</li> </ul> <p><b>Key Applications</b></p> <ul style="list-style-type: none"> <li>MS D365, Markets, Riptide/ Mekong</li> </ul>	<ul style="list-style-type: none"> <li>Staff - Execution of sales by monitoring and tracking all activities, Process leads and convert to sales, Establish and set up events</li> <li>Management - Define goals, track progress, and approve changes to plans, prices, and key data activities. Use the information to determine the effectiveness of programs</li> </ul>	<ul style="list-style-type: none"> <li>Learner/subscriber analytics showing adoption/retention /dropout stats etc.</li> <li>Campaign conversion analytics</li> <li>Web traffic/sales analytics</li> <li>Digitalization of sales process with persona based apps</li> <li>RIC enablement</li> <li>Automation of tasks and better access to centralized data for recurring analytical tasks</li> </ul>
<p><b>Product Development</b></p>	<ul style="list-style-type: none"> <li>On-time content delivery</li> <li>Catalogue quality</li> <li>Product profitability</li> <li>Product on-time delivery</li> </ul> <p><b>Key Applications</b></p> <ul style="list-style-type: none"> <li>Storm Clouds, Adobe, Riptide, Kentico/ Mekong</li> </ul>	<ul style="list-style-type: none"> <li>Coordination and production of learning content across all departments</li> <li>Localization of content</li> <li>Content Update &amp; Testing</li> <li>Communication of product schedule to all departments</li> </ul>	<ul style="list-style-type: none"> <li>Workflow optimization for course design, learner assessment</li> <li>Search optimization, trend updates</li> <li>Simplified content upload, update and testing</li> <li>Automated testing and deployment tools</li> </ul>
<p><b>CPQ/ CI</b></p>	<ul style="list-style-type: none"> <li>On-time training delivery</li> <li>Class scheduling</li> <li>Attendance, event management</li> <li>CI/ Learner Satisfaction (NPS Score)</li> </ul> <p><b>Key Applications</b></p> <ul style="list-style-type: none"> <li>UML, Kentico, Honey Bee</li> </ul>	<ul style="list-style-type: none"> <li>Schedule and deliver training classes</li> <li>Provide feedback to the product team on user feedback, preferences, and course popularity</li> <li>Conduct training &amp; certify target group (CI or TI)</li> </ul>	<ul style="list-style-type: none"> <li>Streamlined event management platform</li> <li>Centralized content &amp; intuitive automation &amp; UI</li> <li>Ease of content access and share</li> <li>Self-service for most common questions and issues</li> <li>Community support for questions and issues</li> <li>Optimized event setup &amp; execution processes</li> </ul>

## Value Realization

Technology strategy should address value realization and include reporting of results as part of post-implementation. Our recent research with The Everest Group found that a focus on long-term value realization is a key aspect of technology management that enables top performers to achieve 1.7x return on technical investments compared to others. Synoptek believes that all companies can achieve these results and we've developed an IT Governance program to develop this expertise.

## Results With a Strong Inclination Toward Action

We regularly identify hindrances to strategic results that span beyond the initial requests of our clients and our deliverables identify those issues and provide solutions for correction. Our materials focus on clearly identifying the strategic direction of the company and then progressing into options and integration timelines for all recommendations. Changes to new or existing roles are called out along with key capabilities to facilitate the long-term development of resources.

## About Synoptek

Synoptek delivers accelerated business results through advisory-led transformative systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.