

Developing a Strategic Roadmap

Why you need it & how to do it right

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Juan Porter
TopDown Consulting

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COLLABORATE13
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Juan Porter – Experience Overview



- President & Founder of TopDown Consulting
- Over 25 years experience delivering EPM solutions to numerous Fortune 1000 clients across more than 20 industry verticals
- Specializations include enterprise performance management, business intelligence, data warehousing, technical architecture, and master data management
- Regular blogger, frequent speaker, and contributor to various industry publications
- Chairman, OAUG Hyperion SIG

Representative Sample of Clients

- Adecco
- AT&T
- CoBank
- DirecTV
- E*Trade
- Estee Lauder
- Franklin Templeton
- Group 1 Automotive
- HSBC
- Iron Mountain
- QAD
- Pella
- Shutterfly
- Take-Two Interactive
- Wachovia
- Washington University School of Medicine



What is a Strategic Roadmap?

A Strategic Roadmap is a comprehensive framework envisioning, developing, guiding, and measuring project initiatives—

- Establish Strategic (End State) Vision
- Identify Project Goals & Objectives
- Current State Assessment & Architecture
- Recommended Implementation Approach and Scope
- Preliminary Design
- High-Level Project Timelines
- Resource Requirements
- Preliminary Cost Estimates
- Identification of Risks and Challenges
- Definition and Measurement of Success Factors



Success Factors



Audience	Tangibles	Experience	Realize
Executives	<ul style="list-style-type: none"> ▪ Ability to perform “what-if” scenarios quickly ▪ Monthly close efficiencies ▪ Shorten planning cycle 	<ul style="list-style-type: none"> ▪ Confidence in reports ▪ Improved analysis and forecasting ▪ Compliance 	<ul style="list-style-type: none"> ▪ Report earnings in ?? days ▪ Forecast more accurately ▪ Reduce audit fees ▪ Execs using Dashboards
Project Team	<ul style="list-style-type: none"> ▪ Go Live on schedule ▪ Get internal recognition ▪ Improve data quality ▪ # of users on solution 	<ul style="list-style-type: none"> ▪ Deliver project on time and within budget ▪ Become self-sufficient ▪ Simplify processes ▪ Make users happy 	<ul style="list-style-type: none"> ▪ Set target date and budget ▪ Reduce maintenance by ?? ▪ Reduce errors by ?? ▪ User satisfaction rating ▪ Measure ROI
End Users	<ul style="list-style-type: none"> ▪ Ability to perform “what-if” scenarios quickly ▪ More time spent on analysis, less on data entry 	<ul style="list-style-type: none"> ▪ Easy of use ▪ Better access to data ▪ More timely reporting ▪ Less manual input 	<ul style="list-style-type: none"> ▪ Identify amount of time saved ▪ Improve accuracy
IT	<ul style="list-style-type: none"> ▪ Reduce cost of IT support ▪ Verify compliance ▪ Ability for internal team to support solution 	<ul style="list-style-type: none"> ▪ Stable environment ▪ Integrate security ▪ Fits internal standards ▪ Compliance 	<ul style="list-style-type: none"> ▪ Supportable ▪ Achieve internal standards ▪ Measure performance



Why Do You Need a Roadmap?



- To create an internal understanding of how your current solution/process works
- To identify opportunities for improvement and recommended future state systems and processes
- To map out an overall implementation approach with a series of achievable initiatives and project wins
- To improve communication by establishing a common vision and vocabulary
- To describe the benefits desired from the proposed solution and identify the measures of success
- To achieve a measurable return on your investment



Leading Practices



- Clearly define vision
- Driven by CFO, supported by CIO
- Understand that ERP is not the only source of data
- Use technology for it's intended purpose
- Involve the users
- Know what's needed and how it will be used
- Challenge the current state – encourage change
- Identify risks and how to mitigate
- Communicate



Change Management



- Successful Change Management = User Adoption
- Socialize vision, solution, and new processes
 - Leverage Executive support
 - Identify thought leaders (cheerleaders and detractors)
 - Get buy-in from users at all levels
 - Listen / Empathize
- Communicate with and involve users throughout project
- Capture their concerns and ideas



EXAMPLES



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Sample Goals & Objectives



- To achieve a shared understanding of potential opportunities & areas of improvement
- Eliminate redundant repositories of data
- Improve reporting performance and usability
- Increase confidence in the numbers
- Leverage existing investment in ERP and other data systems
- Create self-serve reporting environment where users focus on analysis, not generating reports
- Reduce administrative complexity by providing automated solutions where possible



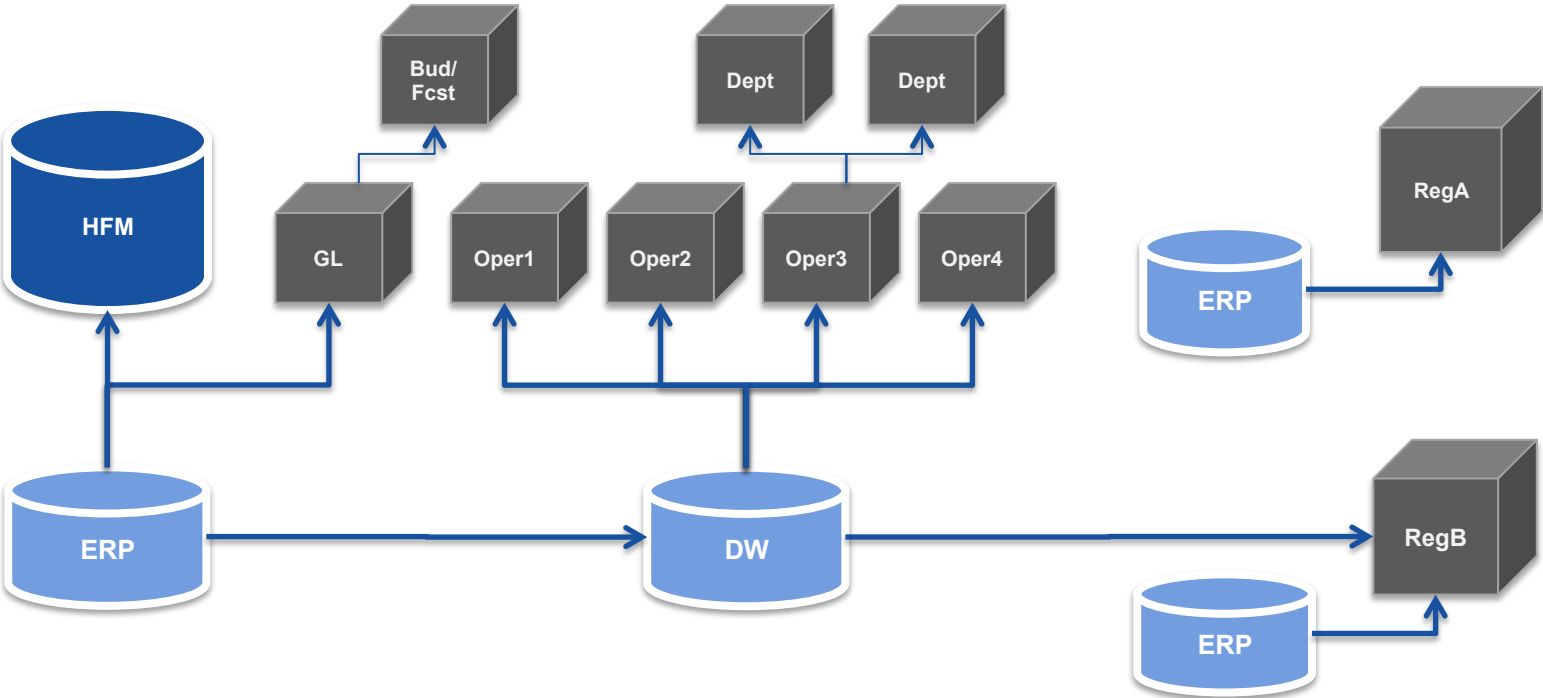
Current State Assessment



- Evaluate current processes
 - How did our current process evolve over time?
 - What do we like about the current process?
 - What do we dislike about the current process?
- Determine what information you need to manage, and how you want to measure it
 - What's important?
 - Alignment with corporate goals and objectives
- How is this maintained / updated



Current State Architecture



Possible Risks



- Data availability, cleanliness, comparability, and integrity
- Resource availability
- Change in reporting requirements
- Change in organization priorities
- Dimensionality differences among ERP, DW, HFM, and Essbase



Project Timeline & Resources



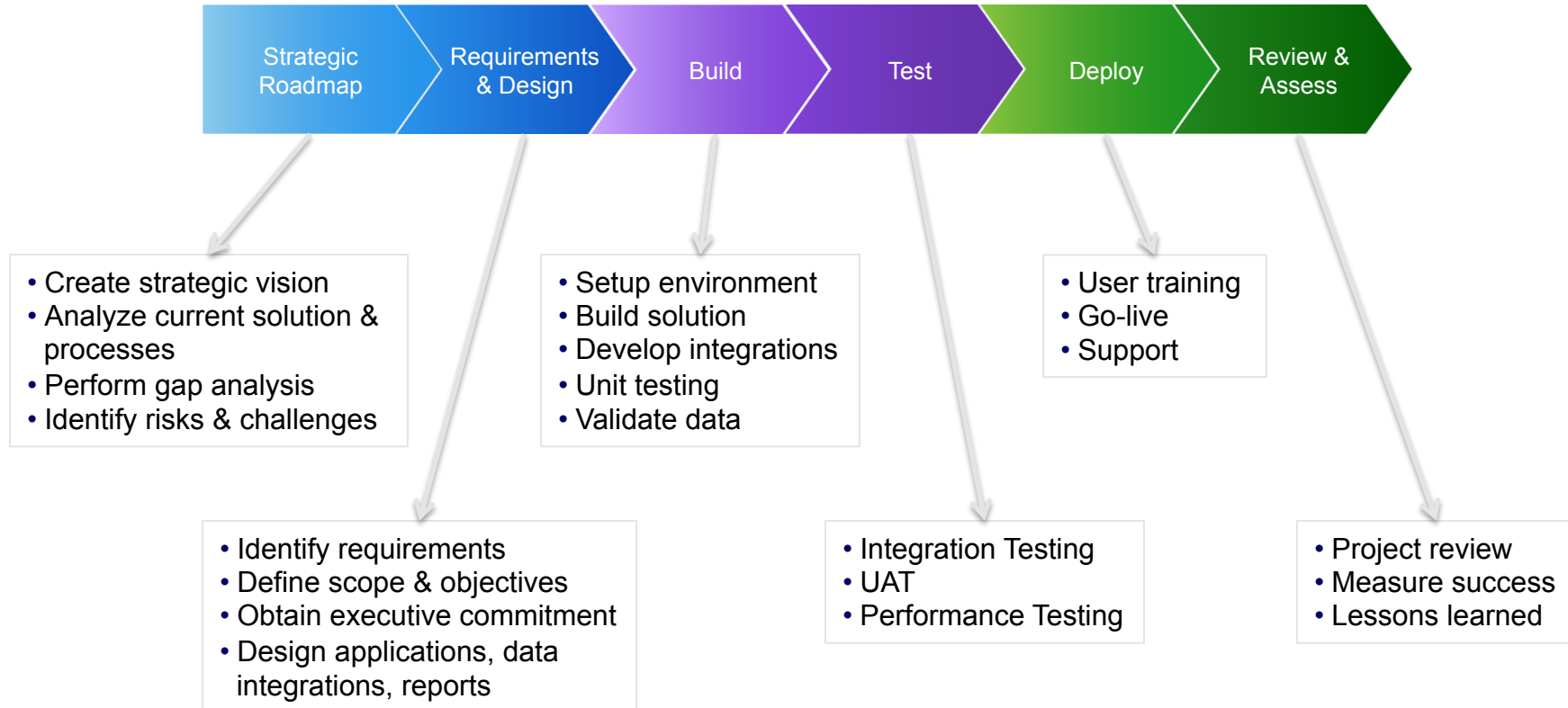
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Project Management	[Dark Blue Bar]																																										
Installation of Servers and Software	[Dark Blue Bar]																																										
Requirements Gathering	[Dark Blue Bar]																																										
Design	[Dark Blue Bar]																																										
HFM	[Grey Bar]																																										
Application Build	[Dark Blue Bar]																																										
-Dimensions	[Light Blue Bar]																																										
-Rules and Formulas	[Light Blue Bar]																																										
-Load & Reconcile Data	[Light Blue Bar]																																										
-Reports	[Light Blue Bar]																																										
-Security	[Light Blue Bar]																																										
System Integration Testing	[Red Bar]																																										
Training, User Testing, and Resolution	[Green Bar]																																										
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Go-Live	[Green Bar]																																										
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Testing & Resolution	[Light Blue Bar]																																										
User Training	[Light Green Bar]																																										
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PLANNING THE PROJECT



Understanding the Project Phases



Requirements



- Identify and document requirements
 - Business, Users, and IT
- Evaluate against business purpose
 - Why is a requirement required?
 - How does it help the process, provide insight, or improve the ability to manage?
- Resolve conflicting requirements
- Develop high-level design and key benefits
- Socialize
- Approve



Design the Solution



- Review Roadmap and Requirements
 - Make sure everyone on same page
- Separate processes
 - Identify dependencies and key steps
 - Determine accountability and ownership
- Define solution structure
 - Dimensions, Business Rules, Integrations, etc.
- Develop prototype to visualize solution
 - Increase understanding and support
 - Mitigate resistance
- Create Design Document and Project Plan
- Establish Communication Plan



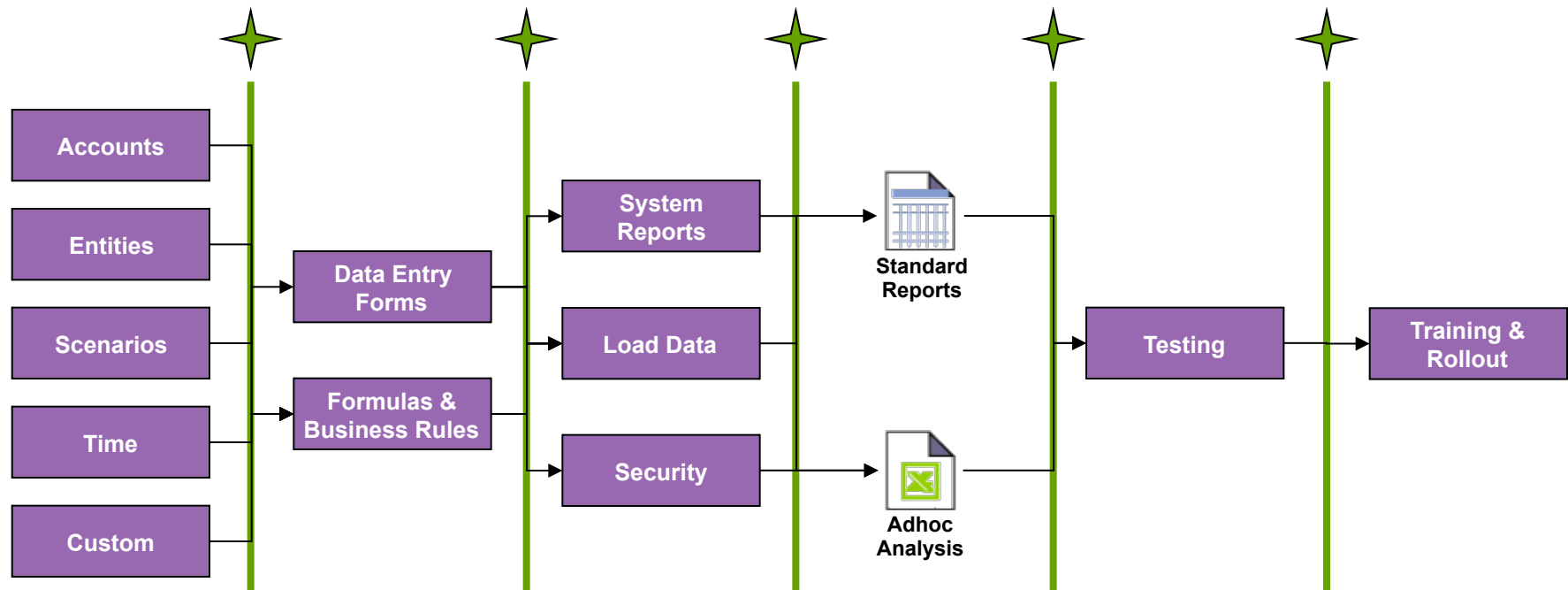
Build the Solution



- Implement the established design
- Follow the project plan
- Closely monitor project
 - Resources
 - Effort to complete tasks and project
 - Budget
 - Contingencies
- Communicate any changes to design immediately
 - Review with stakeholders and obtain sign-off
- Maintain transparency
 - Acknowledge success and milestones
 - Bad news does not get better with time



Application Development Cycle



Testing the Solution



- Establish testing processes and identify participants
- Types of testing
 - Integration Testing
 - Performance Testing
 - User Acceptance Testing
 - Parallels
- Process
 - Prepare test environment
 - Develop test scripts
 - Train “testers”
 - Perform test
 - Collect results and make changes as needed
 - Approve results



Deploy to Users



- Prepare the organization for Go Live
- Transition will demonstrate adoption of solution
- Preparation:
 - Build sign-off
 - Develop training materials
 - Confirm logistics for training
 - Internal resources are designated for training
- Process:
 - Constant knowledge sharing with the organization's users
 - Create the training plan and documentation
 - Deliver the training
 - Determine post-implementation support plan



Review & Assess – Quantify Success



- Measure achievement of critical success factors
 - Not all improvements are realized at Go Live
- Demonstrate predicted benefits of the project to stakeholders
- Build momentum within the organization to begin next phase of the Strategic Vision
- Capture lessons learned during project



COMMON PITFALLS



Common Pitfalls



- Effort to reconcile data
 - Data is never as clean as you might expect
- Internal Audit not engaged
- Lack of defined roles between
 - Finance and IT
 - Admin and Users
- New technology, same old process
- Underestimating change management



Questions?
Comments?



THANK YOU

Juan Porter
President & Founder, TopDown Consulting
jporter@topdownconsulting.com

