Developing a Strategic Roadmap
Why you need it & how to do it right

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# 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

### Executives
- Ability to perform “what-if” scenarios quickly
- Monthly close efficiencies
- Shorten planning cycle

### Project Team
- Go Live on schedule
- Get internal recognition
- Improve data quality
- # of users on solution

### End Users
- Ability to perform “what-if” scenarios quickly
- More time spent on analysis, less on data entry

### IT
- Reduce cost of IT support
- Verify compliance
- Ability for internal team to support solution

## Tangibles

### Executives
- Confidence in reports
- Improved analysis and forecasting
- Compliance

### Project Team
- Deliver project on time and within budget
- Become self-sufficient
- Simplify processes
- Make users happy

### End Users
- Easy of use
- Better access to data
- More timely reporting
- Less manual input

### IT
- Stable environment
- Integrate security
- Fits internal standards
- Compliance

## Experience

### Executives
- Report earnings in ?? days
- Forecast more accurately
- Reduce audit fees
- Execs using Dashboards

### Project Team
- Set target date and budget
- Reduce maintenance by ??
- Reduce errors by ??
- User satisfaction rating
- Measure ROI

### End Users
- Identify amount of time saved
- Improve accuracy

### IT
- Supportable
- Achieve internal standards
- Measure performance

## Realize

### Executives
- Reduce maintenance by ??
- Reduce errors by ??

### Project Team
- User satisfaction rating
- Measure ROI

### End Users
- Improve accuracy

### IT
- 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 its 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
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

### Project Management
- Installation of Servers and Software
- Requirements Gathering
- Design
- HFM
- FDM
- Application Build
  - Dimensions
  - Calc Scripts
  - Load & Reconcile Data
  - Reports
  - Security
- System Integration Testing
- Training, User Testing, and Resolution
- Parallel Testing
- Go-Live

### Infrastructure
- Infrastructure Management
- FDM
- Essbase

### Application Build
- Dimensions
- Calc Scripts
- Load & Reconcile Data
- Reports
- Security
- System Integration Testing
- Training, User Testing, and Resolution
- Parallel Testing
- Go-Live

### Reporting
- Reports

### Security
- Security

### Dates
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### Dates Breakdown
- Month 1: 1-31
- Month 2: 1-31
- Month 3: 1-31
- Month 4: 1-31
- Month 5: 1-31
- Month 6: 1-31
- Month 7: 1-31
- Month 8: 1-31
- Month 9: 1-31
- Month 10: 1-31

### Notes
- Go-Live
- Infrastructure Management
- FDM
- Essbase
- Application Build
- Dimensions
- Calc Scripts
- Load & Reconcile Data
- Reports
- Security
- System Integration Testing
- Training, User Testing, and Resolution
- Parallel Testing
- Go-Live

### Events
- Installation of Servers and Software
- Requirements Gathering
- Design
- HFM
- FDM
- Application Build
- System Integration Testing
- Training, User Testing, and Resolution
- Parallel Testing
- Go-Live

### Resources
- Project Management
- Infrastructure Management
PLANNING THE PROJECT
Understanding the Project Phases

**Strategic Roadmap**
- Create strategic vision
- Analyze current solution & processes
- Perform gap analysis
- Identify risks & challenges

**Requirements & Design**
- Identify requirements
- Define scope & objectives
- Obtain executive commitment
- Design applications, data integrations, reports

**Build**
- Setup environment
- Build solution
- Develop integrations
- Unit testing
- Validate data

**Test**
- Integration Testing
- UAT
- Performance Testing

**Deploy**
- User training
- Go-live
- Support

**Review & Assess**
- Project review
- Measure success
- Lessons learned
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

- Accounts
- Entities
- Scenarios
- Time
- Custom

- Data Entry Forms
- System Reports
- Load Data
- Security

- Standard Reports
- Adhoc Analysis

- Testing
- Training & Rollout
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

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