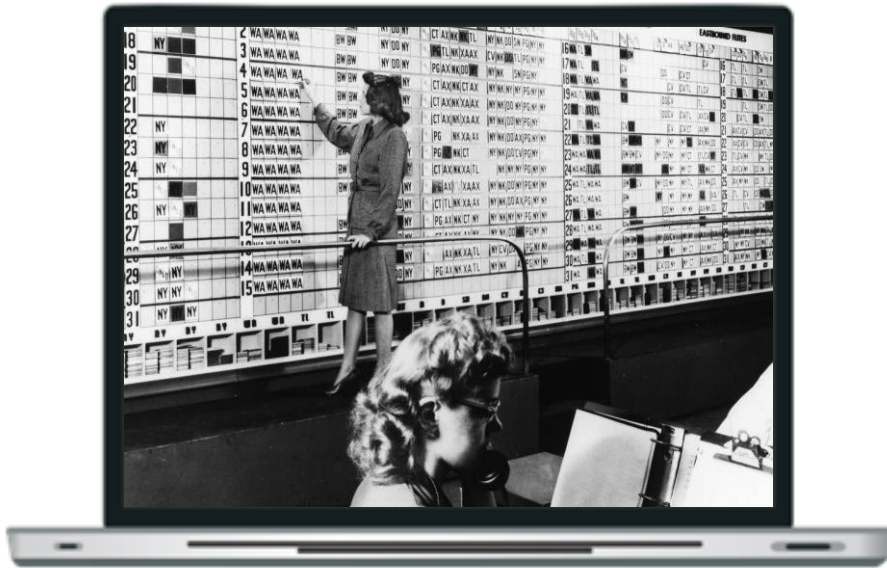




CUSTOMERIZATION

Client Logo



Digital Technology Adoption Roadmap For <Client Company Name>

<Date>

Agenda



- ✓ Executive summary
- ✓ Business technology current state
- ✓ Key recommendations
- ✓ Implementation roadmap
- ✓ Change management needs

Executive Summary

Background: <Client> engaged Customerization team in May 2021 to analyze the current state of <Client's> digital technology, identify gaps, and recommend a technology architecture solution to achieve the desired state of <Client's> digital transformation.

Main challenges identified

- !! Multiple, disconnected software applications are used by different teams
- !! High cost of the software licenses
- !! Data loss between the tools
- !! Extremely high manual tasks proportion given the IT investment done so far
- !! Rapid business scaling is impossible with the current infrastructure
- !! Ecommerce side of the business disconnected from the rest of the activity
- !! Lack of reporting and in-depth business visibility makes effective business decision making impossible

Goals and success criteria

- ✓ Fully interconnected technology stack
- ✓ Manual work comprises less than 20% of the overall tasks
- ✓ Monthly software costs reduces by ca. 50%
- ✓ Advanced reporting on any business KPIs available on a click of a button
- ✓ Scaling with new LOBs and employees is easy due to the streamlined automated processes
- ✓ Connected eCommerce, affording for efficient cross-sale and customer service
- ✓ Happy employees as a result of reduced manual work and errors level

Current State – Tech and People

Company Profile

- Wellness sector
- Ecommerce and traditional LOBs
- HQ – Winnipeg
- 16 employees
- 30+ external contractors
- Offers tailored, instructor-led, individualized fitness and wellness programming
- Corporate structure:
 - CEO
 - HR
 - PA
 - Sales
 - CFO
 - Account receivables
 - Account payables
 - RevOps
 - COO
 - Operations Lead
 - Ops team
 - Ecomm team

Information Management Systems

- Asana – project management
- Slack – internal communications
- Google Drive – document storage
- Office 365 suite
- QBO – accounting and Finance
- Shopify- based website
- MailChimp – email marketing
- Calendly – appointments settling
- TeamUp – shared calendars
- TypeForm – forms

Manual or non-existent:

- CRM (customer database management and sales process management) – non-existent
- Invoicing – manual
- Subscriptions – manual
- Client and instructors onboarding – manual
- Customer Portal – non-existent
- Instructors Portal – non-existent

Current State – Infrastructure

Methodology

We checked:

- Online security (firewalls etc.)
- Servers
- Back-ups
- Business communication (email systems, collaboration tools, etc.)
- Business applications (Word, Excel, etc.)

<Client> has a high level of risk associated with its existing Server and Storage infrastructure. The current server, which maintains critical accounting data is not being properly managed and maintained. Additionally, the backups are not managed or monitored, which could lead to a possibility for data loss.

Findings

Moving forward, <Client> should:

- Invest in cloud migration
- Maintain vendor support agreements
- Invest in IT Managed Services to support users
- Improve devices and data security for shared files

By leveraging established business grade technologies such as cloud business process management, collaboration, and data backups, <Client> can be prepared to service immediate mid- and long-term technology needs.

Key recommendations

System Components and functionality: CRM

- Data reporting, list generation
- Privacy Settings
- Health Data
- User Settings
- Filtering data for reporting
- Company/Target Accounts features
- Contact Activities and Notifications
- Logging customer emails to CRM profiles
 - Email uploads (with attachments)
 - Dashboards
- Customization per user type
- Different users: Coaches, health-care providers (dietitians, social workers etc.), corporate team
- Outward facing interface/ dashboard/ account possibility for the client to:
 - View scheduled appointments
 - Find links to book sessions
 - Form submission notification options

Key recommendations

System Components and functionality: **Ecommerce**

- Payment processing and subscriptions
 - Automated Insurance Receipt
 - Editing single payment items
 - Freezing a payment
 - Zero-ing out a payment
- E-contracts
 - Health services consent forms
 - Terms and conditions agreement
- Customer account payment detail updates
- Integration with Shopify
 - Pulling in customer data from Shopify including address and purchases

Key recommendations

System Components and functionality: **Marketing**

- Email marketing
 - Automated marketing - Including Drip Marketing
 - Automated Regular emails
 - Regular Marketing emails
 - Customizability of email design
 - Email send segmentation
- Integration with Social Media platforms, reporting, posting capabilities
- Live chat interface
 - Client perspective
 - Employee perspective
 - Contact association
- SEO Statistics
- Cross-platform campaign tracking

Key recommendations

System Components and functionality: Operations and Customer Service

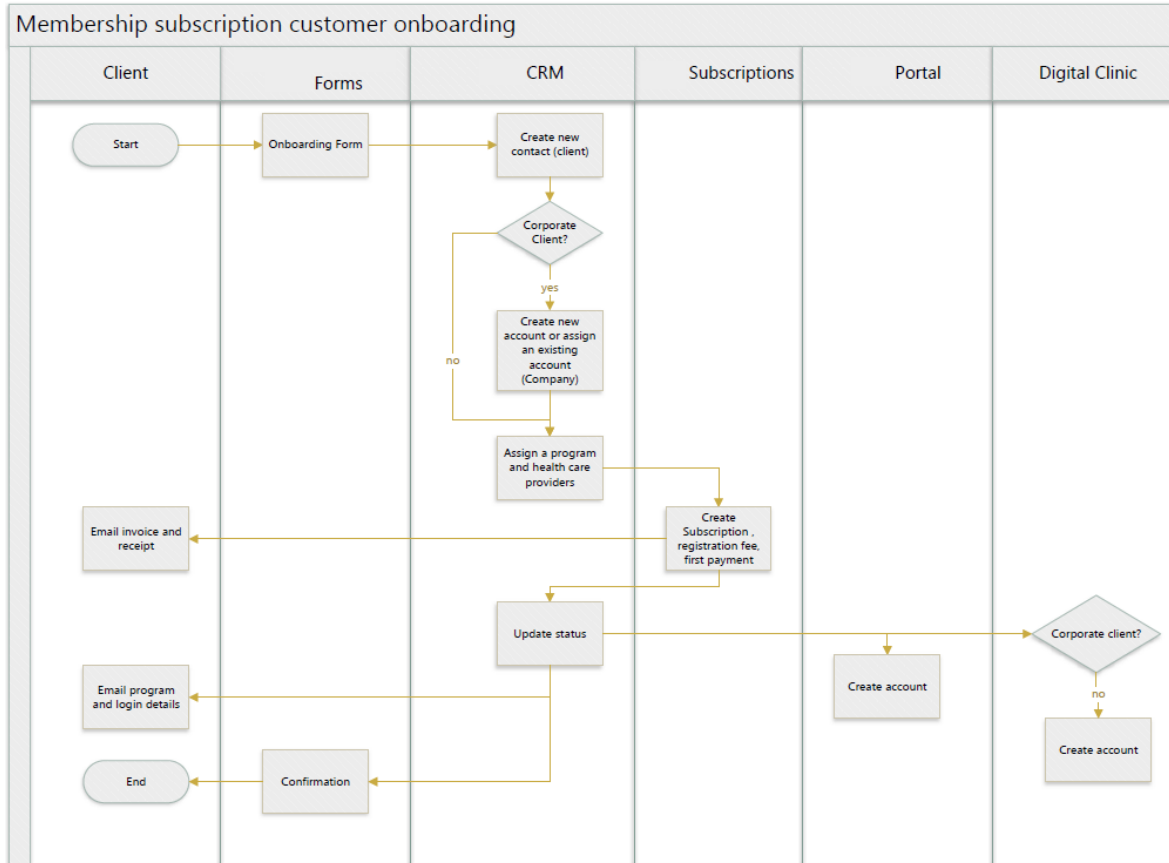
- Workflow automation customization
 - Meal plan reminders for coaches
 - Mid-month review reminders for dieticians
 - Mindset session reminders for clients
 - Form submission error notification to admin
- Basic ticketing system

Key recommendations

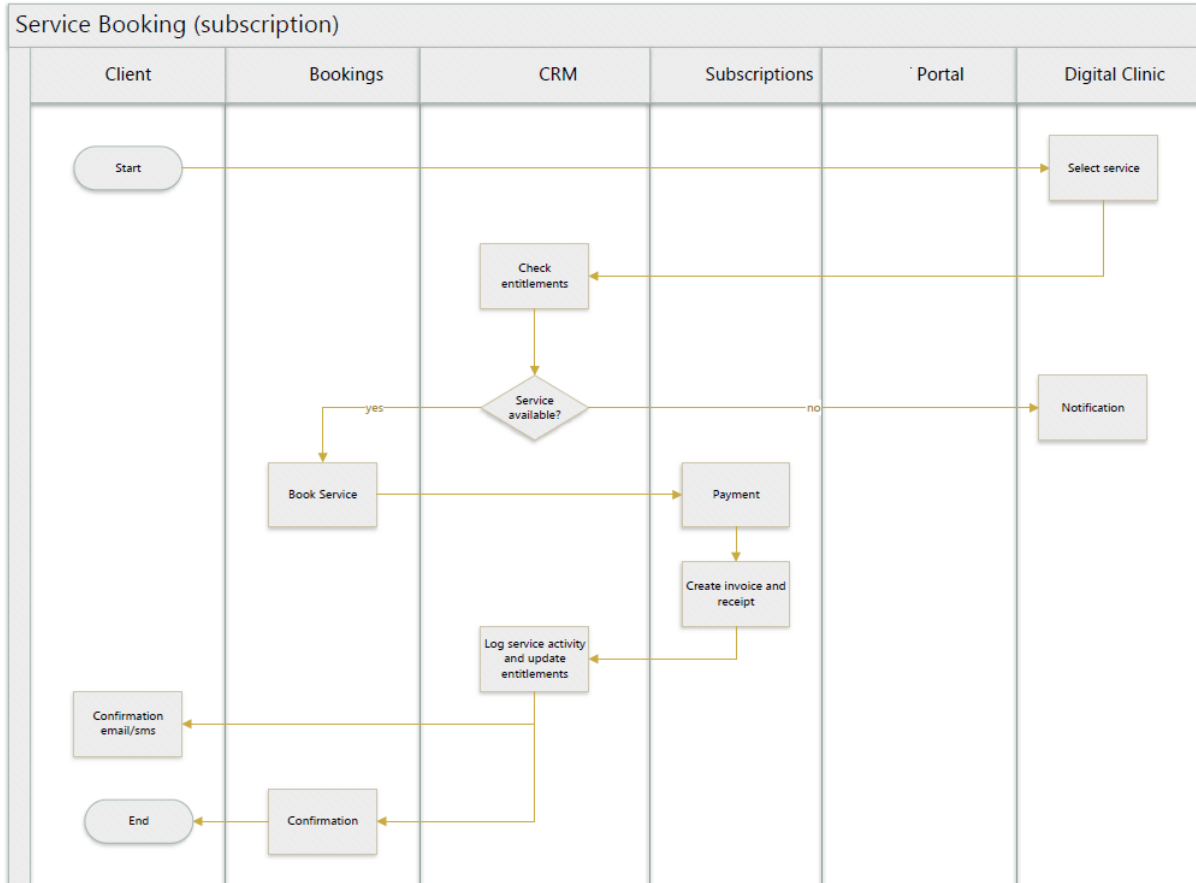
System Components and functionality: Sales

- Deal stage automation capabilities
- Retention statistics
- Email templates
- Task scheduling
- Virtual meeting capabilities and limitations
 - Email reminders for meetings

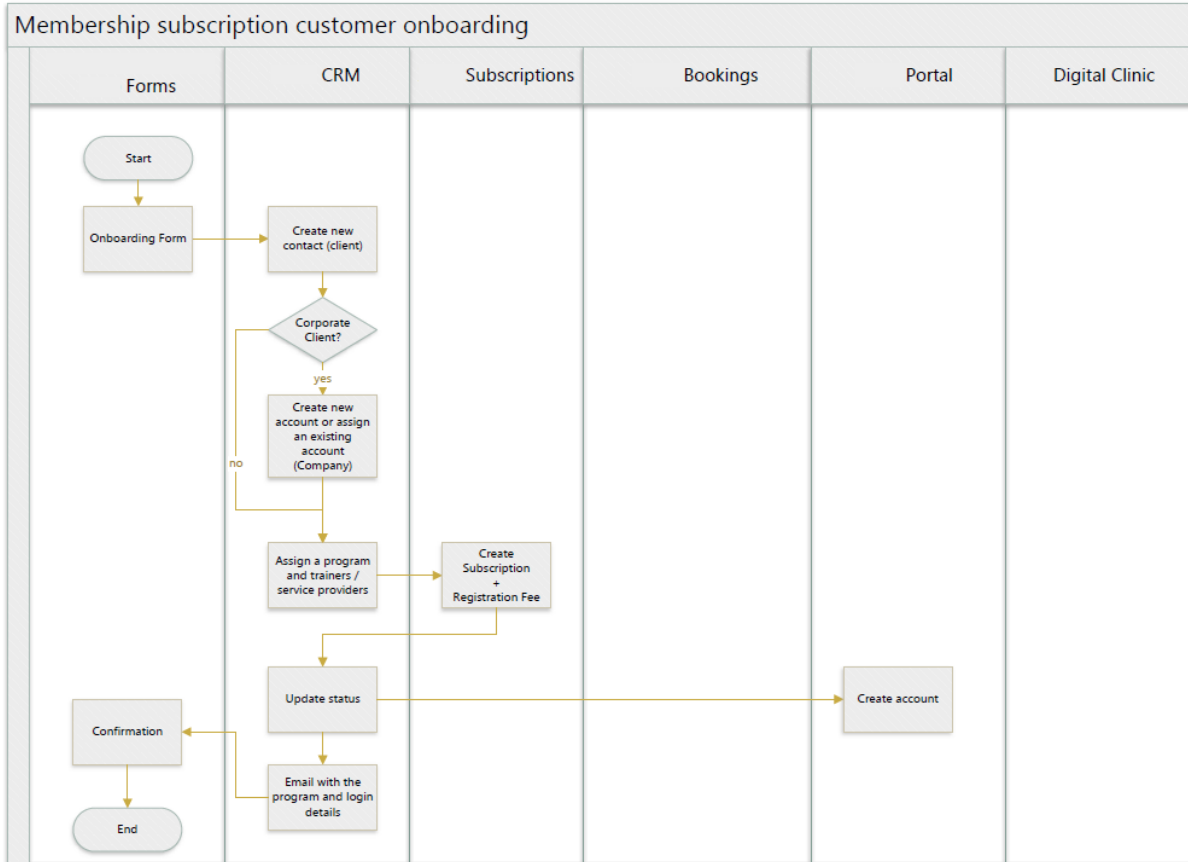
Main Processes Automation



Main Processes Automation



Main Processes Automation



Organizational Change Management

To make the new system affective, <Client> will need to introduce a Change Management Process to manage organizational business change during the transition to the new system. As new and improved application architecture is introduced in the organization, standard operating procedures, roles and functions may change. Moreover, in some situations a change to policies and resourcing at an organization level may also be needed. A standard change management process allows for managing these changes in the business operations of the organization because of the transition to the target application state.

We recommend appointing an internal change management champion or contract an external change management consultant to coordinate changes required within the business.

The change management champion should have access to senior executives in the organization and should be able to articulate and document decisions required from senior leadership of the organization. The change champion should also have the authority to coordinate and follow-up implementation of business processes and procedural changes from various teams.

User Training

In order to rollout new applications, a successful user adoption strategy is critical. The organization can not gain the return on its investment without managing the adoption of the new application environment.

In the <Client's> case, we recommend the Parallel Adoption approach: the users keep working on the existing environment and in parallel a new environment is introduced which will gradually become the primary environment while the old tools are phased out.

The users within the organization should be provided awareness of the target application landscape and how new business applications will solve current business challenges. The users should also be trained to use the new systems and applications before the rollout.

Resources

Customer relationship management (CRM) solutions

<https://www.bdc.ca/en/articles-tools/technology/free-low-cost-applications/crm-solutions-free-low-cost-options>

How to finance your tech purchases

<https://www.bdc.ca/en/articles-tools/technology/invest-technology/5-tips-for-financing-your-tech-purchase>

Business software and services reviews

<https://www.g2.com/>



Questions?