

DMAP Digital Adoption Plan

February 2024

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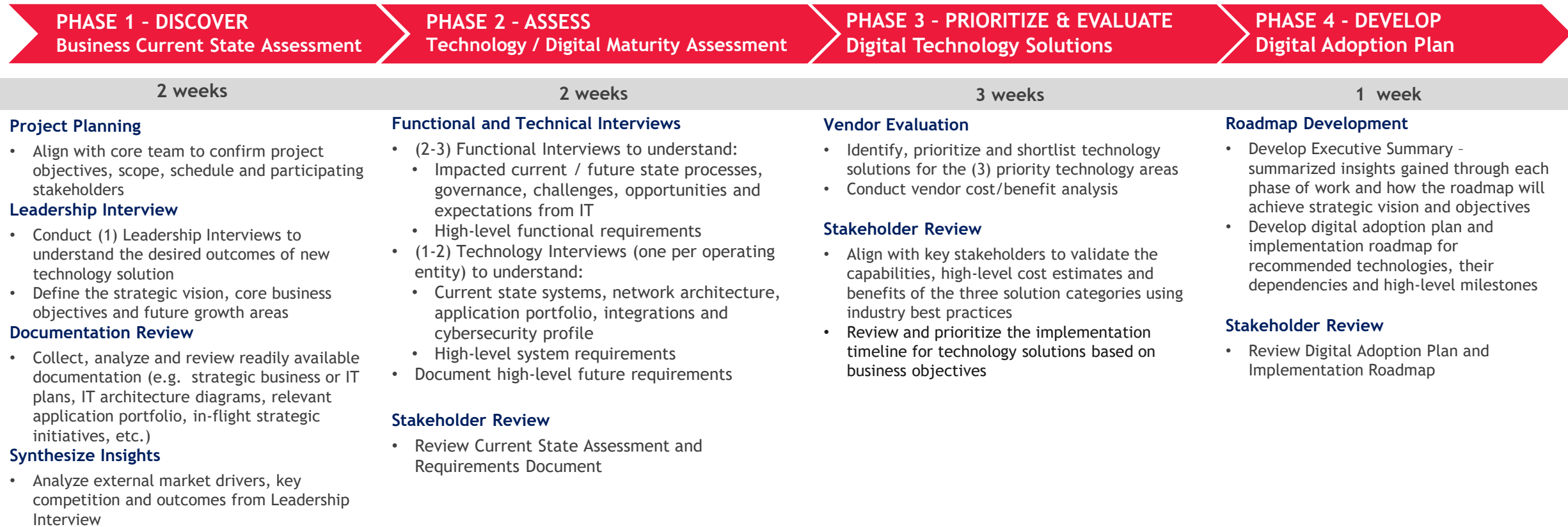
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APPROACH & ENGAGEMENT TIMELINE

Our phased approach over an 8-week period will result in a Digital Adoption Plan and Implementation Roadmap.



Key Deliverables

- | | | | |
|--|--|--|---|
| <ul style="list-style-type: none"> ▶ Business Vision, Objectives, Guiding Principles ▶ Summarize high-level findings | <ul style="list-style-type: none"> ▶ Current State Assessment <ul style="list-style-type: none"> • Summary of Business Vision, Objectives and Guiding Principles • Business Current State (SWOT Analysis) and Digital Maturity Assessment • Summary of Findings and priority technology areas ▶ High-level Requirements Document | <ul style="list-style-type: none"> ▶ Vendor Evaluation and Investment Summary | <ul style="list-style-type: none"> ▶ Executive Summary ▶ Digital Adoption Plan and Implementation Roadmap |
|--|--|--|---|

GOVERNANCE & KEY INTERACTIONS

At BDO, we know you consistently manage many initiatives and time-management is of utmost importance. Therefore, we have summarized the key interactions and time allocation expected for each stakeholder group, based on our developed approach and scope.

Interaction Type

Status Updates

Status meetings will be used to discuss progress on key deliverables outlined in the project plan and for RAID log management and resolution.

Suggested Timing

Bi-weekly or Weekly

15-30 Minutes (Virtual via Microsoft Teams)

Suggested Attendees

Prospective Client

- Core Project Team

BDO

- Core Delivery Team

Stakeholder Interviews

Group interviews be leveraged for leadership, functional and technical interview sessions during Phase 1 and 2 of this engagement. Where necessary 1:1 interviews will be conducted.

During Phase 1 and 2

1-2 hours / Interview (Virtual via Microsoft Teams)

Prospective Client

- Leadership
- Functional: Finance, Operations/Sales, HR, Programs
- Technical: IT

BDO

- Core Delivery Team

Stakeholder Reviews & Final Recommendations Review

This presentation will be utilized to walk key stakeholders through the final recommendations and collect and integrate any additional feedback.

Stakeholder Reviews - Phase 2 and Phase 3

Final Review - Phase 4

1-2 Hours (Virtual via Microsoft Teams)

Prospective Client

- Leadership Team

BDO

- Core Delivery Team

SAMPLE DELIVERABLES

Below are select samples of deliverables from past engagements.

Document Request List

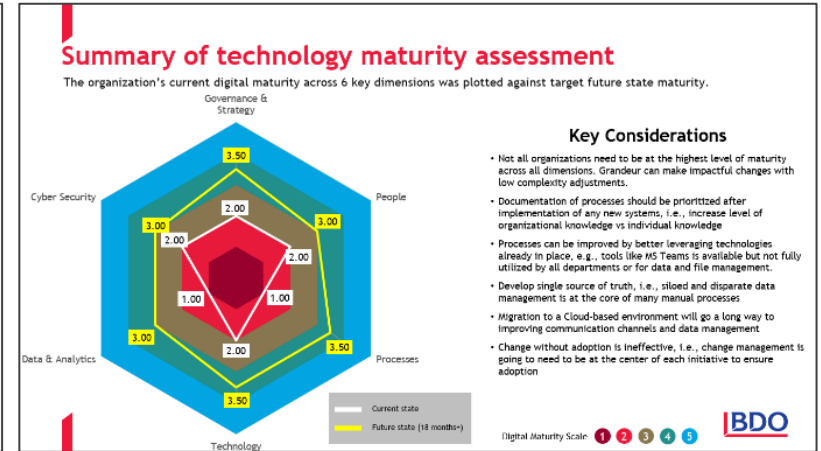
The following is a list of categories of documents that may be available that will assist in your analysis.

DOCUMENT TYPE	KEY OBJECT	DESCRIPTION / EXAMPLES
Corporate strategy	To understand the business vision and overall direction for the organization	Business strategy, business model, business plan, corporate strategy
ERP functional requirements	To understand the functional requirements for the ERP system	ERP functional requirements, ERP implementation plan
HRIS functional requirements	To understand the functional requirements for the HRIS system	HRIS functional requirements, HRIS implementation plan
Change management plan	To understand the change management plan for the organization	Change management plan, change management strategy
IT infrastructure	To understand the IT infrastructure of the organization	IT infrastructure, IT strategy, IT budget
IT security	To understand the IT security of the organization	IT security, IT security policy, IT security audit
IT governance	To understand the IT governance of the organization	IT governance, IT governance framework
IT risk management	To understand the IT risk management of the organization	IT risk management, IT risk management framework
IT performance	To understand the IT performance of the organization	IT performance, IT performance metrics
IT innovation	To understand the IT innovation of the organization	IT innovation, IT innovation strategy

Current state assessment summary

Against the dimensions of focus and maturity model, the following key findings and considerations were identified

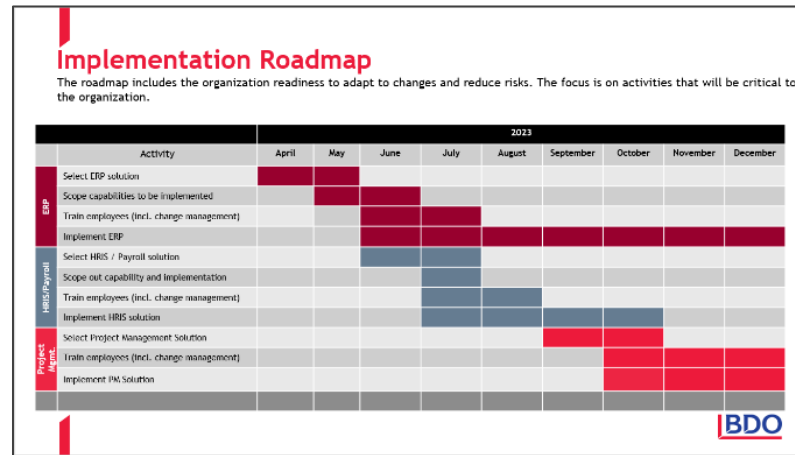
Maturity Dimension	Digital maturity rating	Scoring Rationale	Implications and key considerations
Governance	2 Developing	<ul style="list-style-type: none"> Strong digital strategy is not in place, i.e., most digital initiatives are largely reactive vs proactive Limited formal mechanisms in place to pitch, evaluate, and execute initiatives, e.g., business cases, scorecards, KPIs, etc. 	<ul style="list-style-type: none"> Governance for a company the size of Grandeur does not need to be highly mature. However, a high level digital strategy should be in place to guide decision making
People	2 Developing	<ul style="list-style-type: none"> Lack of any formalized training or onboarding mechanism Several staff members, especially production staff, will likely push back against increased digital adoption Limited communication between offices and departments 	<ul style="list-style-type: none"> Operational continuity risks (i.e., from siloed knowledge/expertise, obsolescence, etc.) Good initiatives fail at the adoption stage. Change management will be required to ensure adoption by staff.
Processes	1 Initial	<ul style="list-style-type: none"> Heavy manual work involved in most processes with 30-50% of time spent on "cut and paste" work, i.e., done through paper trail Lack of consistency in communication methods, e.g., HQ departments use MS Teams, but contractors do not Departments operate in silos Most applications are on-prem No integration between applications present Major applications have limited functionality. Several processes are managed through excel 	<ul style="list-style-type: none"> Increased risk of human error (i.e., as you scale manual/non-scalable processes) Reduced scalability/flexibility (i.e., rapid adaptability to competition, market changes, etc.)
Technology	2 Developing	<ul style="list-style-type: none"> Most applications are on-prem No integration between applications present Major applications have limited functionality. Several processes are managed through excel 	<ul style="list-style-type: none"> Much of the manual work takes place because of the lack of functionality of applications and lack of integration between the. Addressing these issues should be a priority.
Data & Analytics	1 Initial	<ul style="list-style-type: none"> Little to no analytics performed Most data is collected manually through excel and any analysis is done "legally", i.e., after the fact rather than proactively No data management strategy, i.e., individual vs. organizational knowledge 	<ul style="list-style-type: none"> There is fragmented/ad hoc information available that provides insight into business health There is lack of visibility into process bottlenecks and opportunities for improvement
Cyber Security	2 Developing	<ul style="list-style-type: none"> Cyber security limited to data and disaster backup, i.e., no proactive managed detection and response Limited formalized guidance/objectives (e.g., processes, policies/procedures, incident response plan) Limited cyber security awareness training (i.e., regular) 	<ul style="list-style-type: none"> While the likelihood of cyber attacks are low, Grandeur Housing is still open to financial, reputational, and operational risk.



Executive Summary

The following are the three initiatives, as part of a program of digital transformation that complements the longer-term vision to transform Company X into an agile, efficient, and upskilled company.

Initiative	Initiative description and overview	Target business benefits
Initiative 1 e.g. ERP	An ERP will be the finance engine of the organization and will help build a centralized real-time dashboard for all aspects of the organization	<ul style="list-style-type: none"> Agility Efficiency
Initiative 2 e.g. HRIS/Payroll	An HRIS and payroll system will be the hub of human capital management. It will provide applicant tracking, onboarding, employee data management, time-off tracking and benefits management functions.	<ul style="list-style-type: none"> Agility Efficiency Upskilled workforce
Initiative 3 e.g. Project Management	A Project Management solution will automate much of the processes currently done manually in the project management and construction teams.	<ul style="list-style-type: none"> Agility Efficiency





THANK-YOU

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ABOUT BDO CANADA AND BDO GLOBAL

Founded in Winnipeg in 1921, BDO delivers a comprehensive range of assurance, accounting, tax, and technology advisory services, complemented by a deep industry knowledge gained from nearly 100 years working within local communities. As part of the international BDO network, we provide seamless and consistent cross-border services to clients with global needs.

BDO GLOBAL

REVENUE

US\$12.8
BILLION

12.1%
Growth



1,803
offices



BDO CANADA

REVENUE

CAD\$871
MILLION

16%
Growth



From one dream
to a century
of excellence

 GLOBAL
HEADCOUNT
111,307

+14.4%
People

164
countries &
territories



100+
offices



458
 PARTNERS
HEADCOUNT

4,800+
 PERSONNEL
HEADCOUNT

700+

BDO LIXAR EMPLOYEES IN CANADA



BDO CANADA EMPLOYEES

4800+

**As of January 01, 2023*

BDO

BDO CONSULTING

Industry



Energy & Natural Resources

- ▶ Renewable Energy
- ▶ Oil & gas
- ▶ Mining
- ▶ Utilities



Financial Services

- ▶ Insurance
- ▶ Credit unions
- ▶ Private equity



Public Sector

- ▶ Federal
- ▶ Provincial
- ▶ Local government
- ▶ Indigenous



Manufacturing & Distribution

- ▶ Process manufacturing
- ▶ Discrete manufacturing
- ▶ Distribution & supply
- ▶ Cannabis



Not-For-Profit

- ▶ Healthcare
- ▶ Charities
- ▶ Associations



General Industry

- ▶ Retail
- ▶ Technology & life sciences
- ▶ Professional services

Consulting Services



Strategy & Operations

- Strategic Planning
- Operational Excellence
- Change Management



Technology

- **Technology Advisory Services**
- Technology Implementation Services
- Technology Managed Services



Risk Advisory Services

- Risk Advisory
- Security
- Controls Assurance



Human Resources

- People & Performance
- Organizational Effectiveness
- HR Operations & Support

BDO'S COMMITMENT TO SUSTAINABILITY

Working together across North America, we view sustainability as an investment in the strength of our culture, the resilience of our business and the future of our planet.

ENVIRONMENT

- ▶ Climate Change

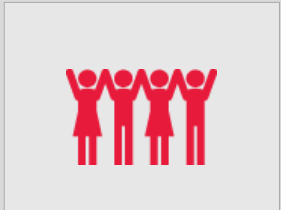


GOVERNANCE

- ▶ Ethical Behaviour

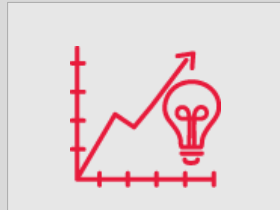
SOCIAL

- ▶ Dignity & Equality
- ▶ Health & Well-Being
- ▶ Skills for the Future
- ▶ Community Involvement and Social Vitality



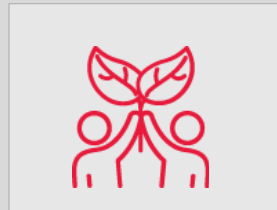
Focusing on topics that matter most to our stakeholders

Using our materiality assessment as a foundation, we commit to ensuring that our strategy, values and actions align with the issues identified by our stakeholders.



Setting and measuring sustainability goals

We commit to setting data-driven, measurable goals and impactful targets, and reporting our progress – the details of which we will share in our sustainability report.



Achieving Net Zero by 2050

As a founding member of the **Net Zero Financial Service Providers Alliance**, we commit to achieve net-zero greenhouse gas emissions by or before 2050.



Using science-based targets

We have committed to set near-term, company-wide emission reductions in line with climate science with the **Science-Based Targets** initiative.



Protecting human rights

We are a signatory of the United Nations Global Compact and commit to conducting our business in alignment with its Ten Principles and to prioritize the advancement and achievement of the U.N. Sustainable Development Goals.

INCLUSION, EQUITY & DIVERSITY

INCLUSION, EQUITY & DIVERSITY

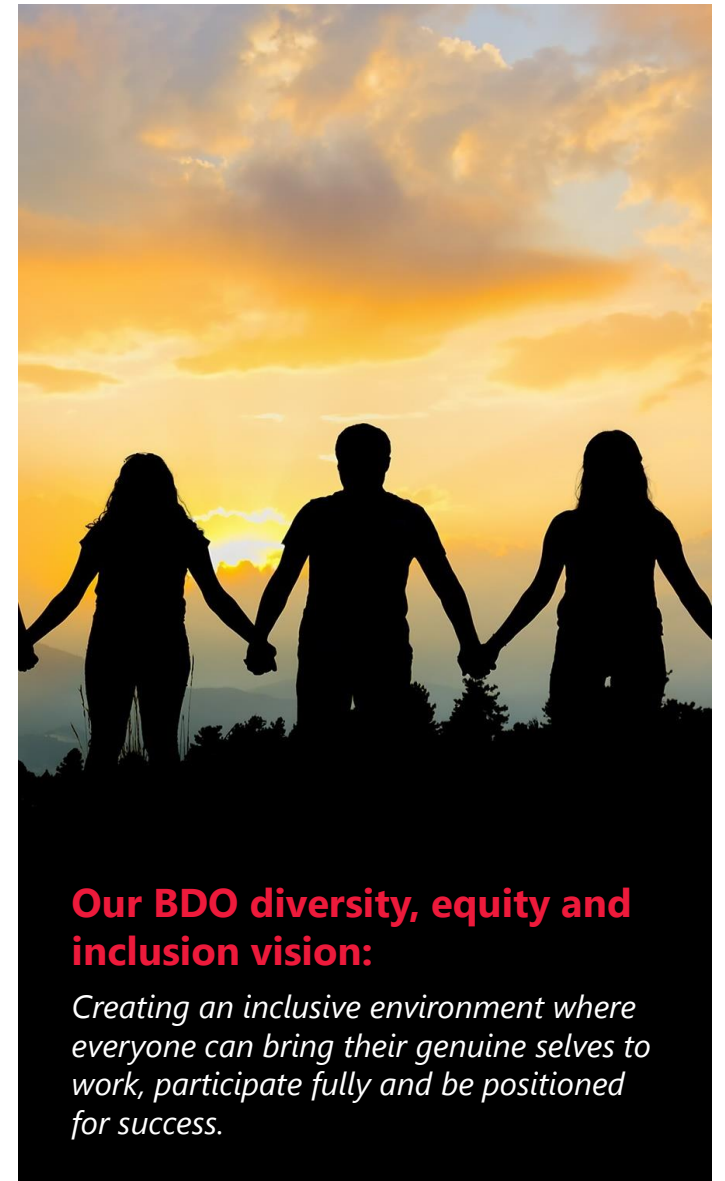
BDO is committed to creating an inclusive and equitable environment where all people can bring their genuine selves to work, participate fully without barriers, and be positioned for success.

Our Goal is to eliminate barriers, creating an environment that maximizes the contributions of everyone at BDO. In recognition of the value that people from different backgrounds and experiences bring, the firm constantly evaluates its policies and procedures to ensure diversity initiatives are incorporated fully and seamlessly into all aspects of our organization. This will result in our firm being a sustainable and diverse firm of the future.

Our Structure includes our Chief Inclusion and Diversity officer, Giselle Bodkin CPA, CA, Partner. We have an organized Inclusion & Diversity Council that meets quarterly to set Diversity and Inclusion strategies for BDO. There are 5 pillar leads as part of our council: **Women, LBGTQ+, Indigenous, Disability, and Visible Minorities**.

Our Internal Strategies focus around diverse hiring and promotion policies, diversity and unconscious bias training for all Partners and employees, communication and sharing on our community yammer pages, celebrations of diversity events like pride month, black history month, mental health day, international women's day and indigenous land acknowledgements along with other celebrations.

Our External Strategies are financially supporting our diverse communities and not-for-profit organizations in over 100 offices across Canada. We support a National "Drive Away Hunger Campaign", we support women, men and para hockey teams and we speak out about important issues such as "Black Lives Matter".



Our BDO diversity, equity and inclusion vision:

Creating an inclusive environment where everyone can bring their genuine selves to work, participate fully and be positioned for success.

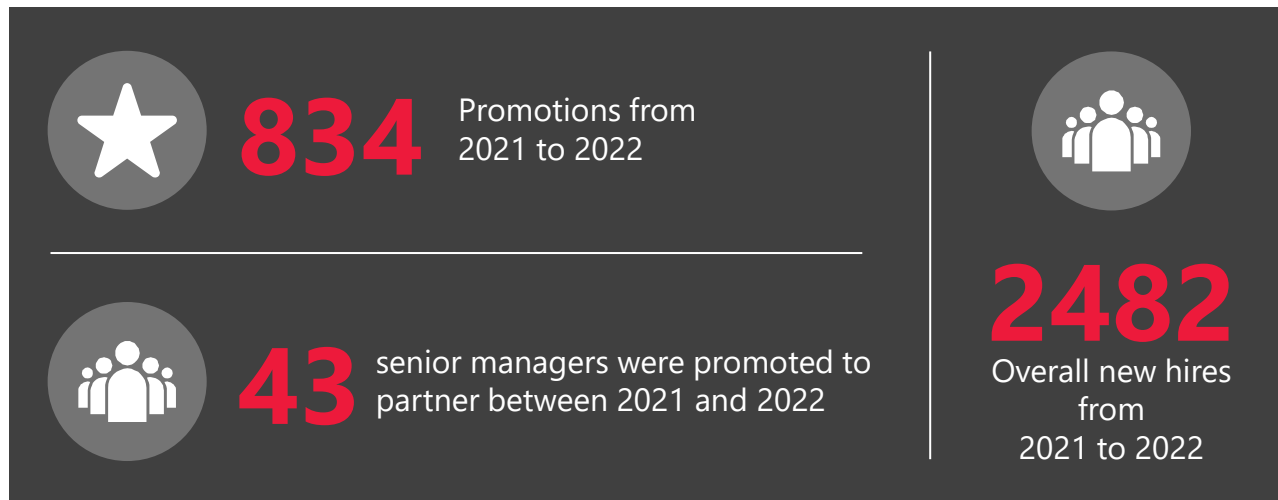
FOCUS ON TALENT

A key strategic pillar

BDO's culture is a powerful differentiator that's integral to our firm's strategy. Our values—embodied by our people and the work we do—guide us day-to-day. They inspire us to build deeper relationships with our clients and to foster an inclusive working environment that promotes collaboration and innovation.

Our culture is rooted in a people-first approach that stems from our humble beginnings. Focused on serving local communities and building longstanding relationships, we've collectively expanded into a nationwide firm that has grown its people, service offerings, and geographic footprint for over 100 years. This same approach to our talent experience has earned us multiple employer awards, including consistently recognized as one of Canada's Top 100 Employers.

As economies and markets shift, so do opportunities to build our culture. And we've always been proud to make every workday our own—prioritizing flexibility, wellness, personalized experiences, and professional development.



BDO Workplace Awards

