



In today's era of volatility, there's no other way but to re-invent. The only sustainable advantage you can have over others is agility, that's it. Because nothing else is sustainable, everything else you create, somebody else will replicate.
- Jeff Bezos, Amazon.

Inteltum's Approach to Digital Transformation

May 2024

How we Organize

Section	Focus Areas
1	Identify processes to be transformed <ul style="list-style-type: none">• Review the business context• Assess business ecosystem & Applications• Identify how your organization delivers value to its customers
2	Identify digitally enabled growth opportunities <ul style="list-style-type: none">• Conduct value stream mapping• Identify leapfrog ideas• Identify impacts to value chain
3	Transform stakeholder journeys <ul style="list-style-type: none">• Identify stakeholder personas and scenarios• Conduct journey mapping exercise• Categorize initiatives
4	Build digital transformation roadmap <ul style="list-style-type: none">• Construct your strategy roadmap

How we Execute

Your Challenge

- Your organization has difficulty adapting new technologies or rethinking the existing business models.
- Your management lacks a framework to rethink how your organization delivers value today, which causes annual planning to become an ideation session that lacks focus.
- There is uncertainty on how to meet evolving customer needs and how to compete in a digital economy.

Common Obstacles

- Your organization might approach digital transformation as if we were still in 2019, not recognizing that the **pandemic** resulted in a major shift to an end-to-end digital economy.
- Your senior-most leadership thinks digital is "IT's problem" because digital is viewed synonymously with technology.
- On the other hand, your IT team lacks the authority to make decisions without the executives' involvement in the discussion around digital.

Inteltum's Approach

- Design a strategy that applies innovation to your business model, streamline and transform processes, and make use of technologies to enhance interactions with customers and employees.
- Use digital for transforming non-routine cognitive activities and for de-risking key elements of the value chain.
- Create a balanced roadmap that improves digital maturity and prepares you for long-term success in a digital economy.

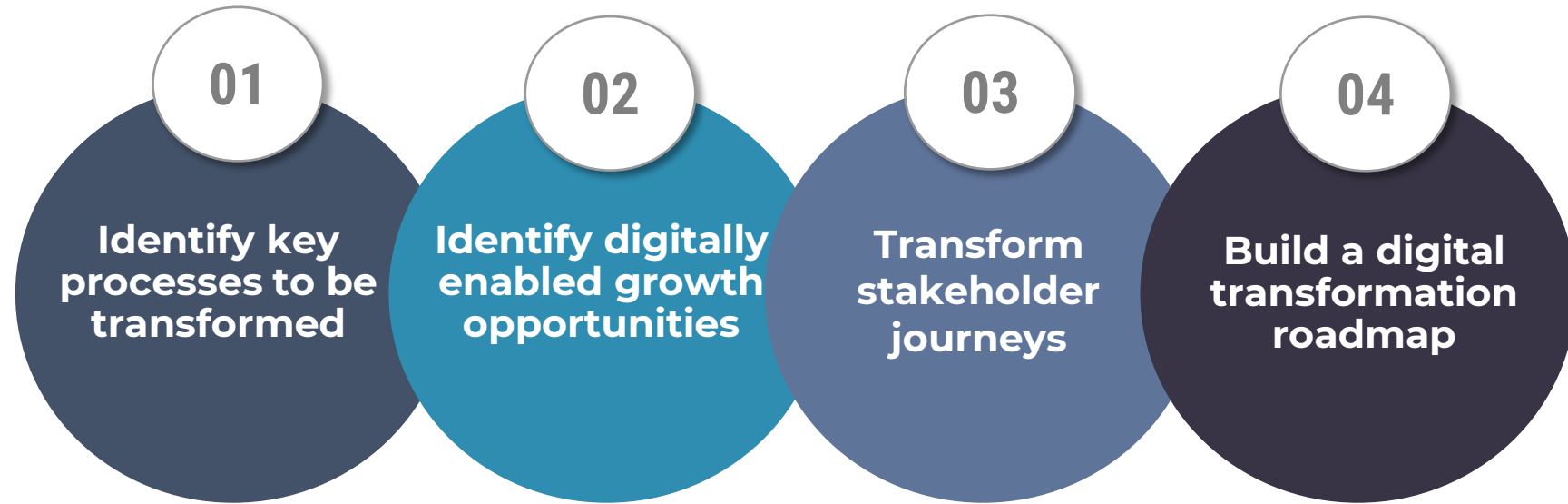
How we Execute

Key Concepts:

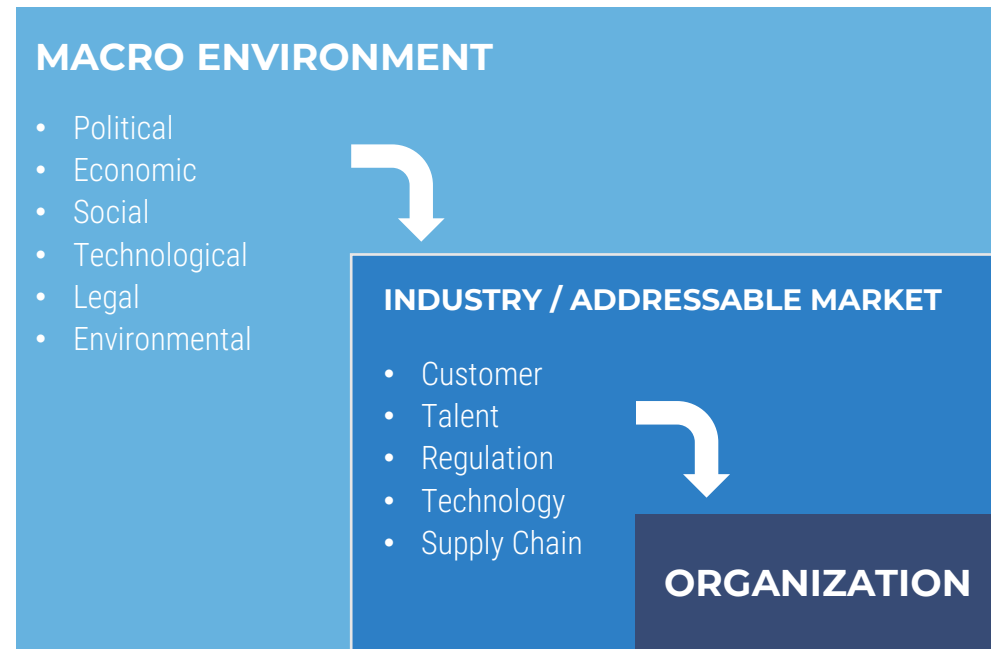
Digital: The representation of a physical item in a format used by computers

Digitization: Conversion of information and processes into a digital format

Digitalization: Conversion of information into a format to be processed by a computer



As **digital transformation** is an effort to transform how you deliver value today, it is important to understand the different **value-generating activities** that deliver an outcome for and from your **customers, industry & addressable Market.**



How we Execute

Key Execution Elements

- Full view of the problem
- External & Internal elements
- Supply Chain (Inputs)
- Customer Value (Outputs)



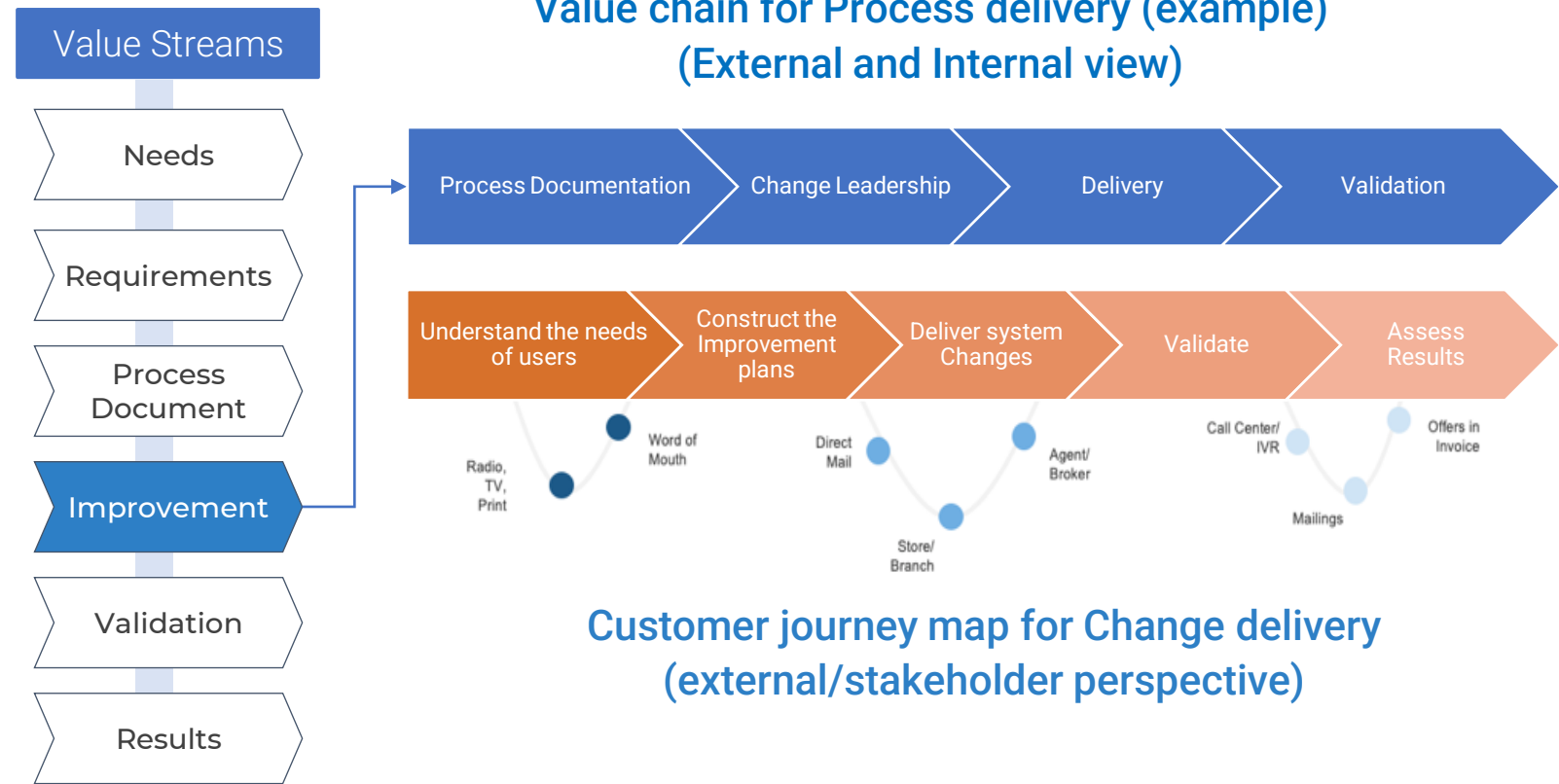
01

Identify key processes to be transformed

How we Execute

Key Execution Elements

- Value Chain & Process Mapping
- Engagement from all stakeholders
- Identification of Pain points and improvement opportunities
- Simple presentations so that everyone follows.
- No Latin, Greek or tech language.



How we Execute

03

Transform stakeholder journeys

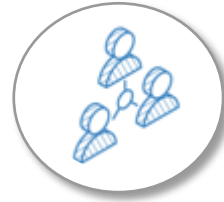
Key Execution Elements

- Simple to follow action plans
- Holding accountable on systems, process and change management actions
- Digital mind-set, focusing on transformation
- Making change last (Dashboards and exception management)



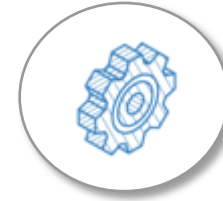
Customer

Create new or different experiences for customers



Workforce

Generate new organizational skills or new ways of working



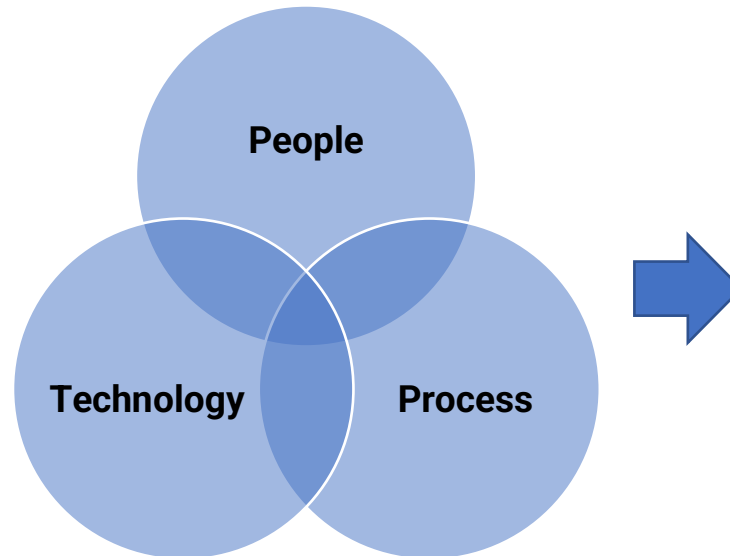
Operations

Improve responsiveness and resilience of operations



Innovation

Develop different products or services



Classification of Initiatives to drive accountability

People	Initiative owner																																																
1	Train researchers on functionality of centralized repository	Brittany																																															
2																																																	
3																																																	
1. Implement Learning Management System																																																	
Acquire & implement a learning management system that allows administration, documentation, tracking, reporting, automation and delivery of educational courses, training programs, or learning and development programs across the organization.																																																	
4	<table border="1"> <tr> <th>Incremental Cost:</th> <th>Initiative Description:</th> <th>Project Timeline:</th> </tr> <tr> <td>\$0</td> <td>Our new LMS will enable e-learning courses that will enhance our L&D capability.</td> <td>2020</td> </tr> <tr> <td>LABOR</td> <td>Staff training and development is the key outcome for this initiative, that results in a world-class sales department to improve how we service our clients.</td> <td>Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4</td> </tr> <tr> <td>\$10,000</td> <td></td> <td></td> </tr> <tr> <td>SYSTEMS</td> <td></td> <td></td> </tr> <tr> <td>\$0</td> <td></td> <td></td> </tr> <tr> <td>CONTRACTS</td> <td></td> <td></td> </tr> <tr> <td>\$10,000</td> <td></td> <td></td> </tr> <tr> <td>TOTAL</td> <td></td> <td></td> </tr> <tr> <td>CIO comments:</td> <td> <table border="1"> <tr> <th>Primary Business Benefits:</th> <th>Other Expected Business Benefits:</th> <th>Initiative Category:</th> </tr> <tr> <td>Increase Knowledge transfer across departments</td> <td>Increase sales technology domain expertise</td> <td>Q1 Business Support</td> </tr> <tr> <td></td> <td>Increase sales closing rate due to compelling customer value</td> <td></td> </tr> <tr> <td></td> <td>Reduce escalations and time to service with more expertise</td> <td></td> </tr> </table> </td> <td></td> </tr> <tr> <td>Risks:</td> <td>Dependencies:</td> <td>Project Team:</td> </tr> <tr> <td>None</td> <td>LMS Vendor</td> <td> <ul style="list-style-type: none"> Business Sponsor: Sean Smith IT Sponsor: William Brady PM: Dave Peters </td> </tr> </table>	Incremental Cost:	Initiative Description:	Project Timeline:	\$0	Our new LMS will enable e-learning courses that will enhance our L&D capability.	2020	LABOR	Staff training and development is the key outcome for this initiative, that results in a world-class sales department to improve how we service our clients.	Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4	\$10,000			SYSTEMS			\$0			CONTRACTS			\$10,000			TOTAL			CIO comments:	<table border="1"> <tr> <th>Primary Business Benefits:</th> <th>Other Expected Business Benefits:</th> <th>Initiative Category:</th> </tr> <tr> <td>Increase Knowledge transfer across departments</td> <td>Increase sales technology domain expertise</td> <td>Q1 Business Support</td> </tr> <tr> <td></td> <td>Increase sales closing rate due to compelling customer value</td> <td></td> </tr> <tr> <td></td> <td>Reduce escalations and time to service with more expertise</td> <td></td> </tr> </table>	Primary Business Benefits:	Other Expected Business Benefits:	Initiative Category:	Increase Knowledge transfer across departments	Increase sales technology domain expertise	Q1 Business Support		Increase sales closing rate due to compelling customer value			Reduce escalations and time to service with more expertise			Risks:	Dependencies:	Project Team:	None	LMS Vendor	<ul style="list-style-type: none"> Business Sponsor: Sean Smith IT Sponsor: William Brady PM: Dave Peters
Incremental Cost:	Initiative Description:	Project Timeline:																																															
\$0	Our new LMS will enable e-learning courses that will enhance our L&D capability.	2020																																															
LABOR	Staff training and development is the key outcome for this initiative, that results in a world-class sales department to improve how we service our clients.	Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4																																															
\$10,000																																																	
SYSTEMS																																																	
\$0																																																	
CONTRACTS																																																	
\$10,000																																																	
TOTAL																																																	
CIO comments:	<table border="1"> <tr> <th>Primary Business Benefits:</th> <th>Other Expected Business Benefits:</th> <th>Initiative Category:</th> </tr> <tr> <td>Increase Knowledge transfer across departments</td> <td>Increase sales technology domain expertise</td> <td>Q1 Business Support</td> </tr> <tr> <td></td> <td>Increase sales closing rate due to compelling customer value</td> <td></td> </tr> <tr> <td></td> <td>Reduce escalations and time to service with more expertise</td> <td></td> </tr> </table>	Primary Business Benefits:	Other Expected Business Benefits:	Initiative Category:	Increase Knowledge transfer across departments	Increase sales technology domain expertise	Q1 Business Support		Increase sales closing rate due to compelling customer value			Reduce escalations and time to service with more expertise																																					
Primary Business Benefits:	Other Expected Business Benefits:	Initiative Category:																																															
Increase Knowledge transfer across departments	Increase sales technology domain expertise	Q1 Business Support																																															
	Increase sales closing rate due to compelling customer value																																																
	Reduce escalations and time to service with more expertise																																																
Risks:	Dependencies:	Project Team:																																															
None	LMS Vendor	<ul style="list-style-type: none"> Business Sponsor: Sean Smith IT Sponsor: William Brady PM: Dave Peters 																																															
5																																																	
6																																																	
7																																																	
8																																																	

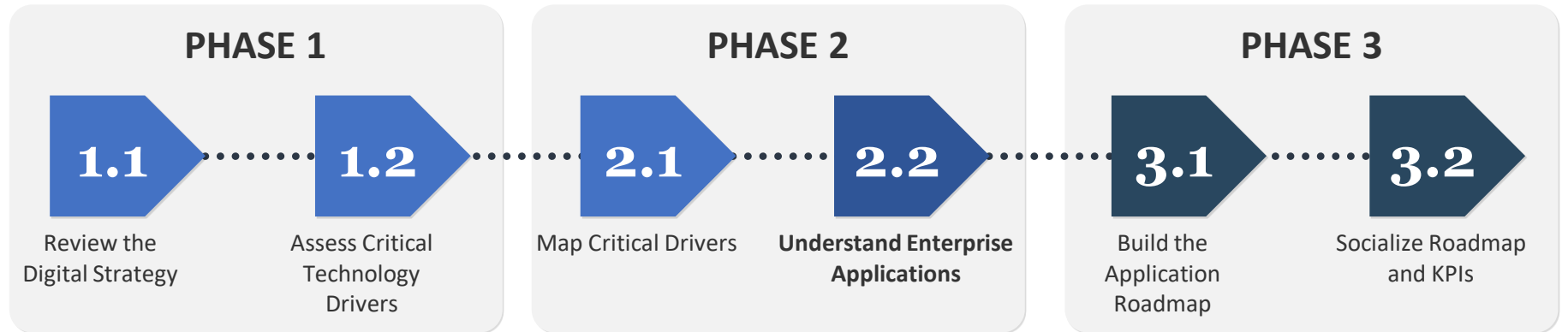
Focused execution aligning with the results

How we Execute

Build a digital transformation roadmap

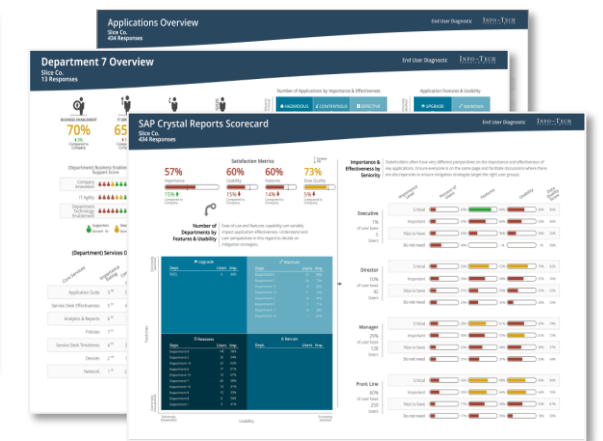
Key Execution Elements

- Multi-generational /Multi-year roadmap as applicable –
 - Applications,
 - Process Initiatives and
 - Change Management
- Results Oriented Dashboards and management engagement
- Digital Thoughtproces, unleashing new value for customers & share-holders.



Application Roadmap																							
Application Description				Year 1				Year 2				Year 3				Year 4				Year 5			
Application Name	Disposition	Implementation Priority Level	Disposition	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1	CMS	High	Re-platform																				
2	ERP	Medium	Retire																				
3	CRM	Medium	Upgrade																				

Application Roadmap



Dashboards to measure success

We're
Known for:

Passion
Execution
Focus
Results

Our Customers:



Intensely Result Oriented in everything we do!

Executive Summary

The plan aims to help clients understand their requirements and goals by adopting new digital technologies. The key elements of the plan include:

- 1. Technology Assessment:** A comprehensive evaluation of the current technology infrastructure and identification of areas where new technologies can be introduced to improve business operations.
- 2. Implementation Strategy:** A clear implementation plan for introducing new technologies into the business, including a timeline, budget, and resource allocation.
- 3. Training and Support:** A comprehensive training and support program for employees to ensure they are able to effectively use new technologies and maximize their benefits.
- 4. Continuous Improvement:** Ongoing monitoring and evaluation of the technology infrastructure to identify areas for improvement and ensure the business remains competitive and meets changing client requirements.

By adopting new technologies, the client will be better equipped to meet their business requirements, improve operational efficiency, and achieve their business goals. Implementing this plan will help the SME stay ahead of the competition and remain relevant in a rapidly changing technological landscape.

Initial Business Engagement & Assessment

Our Approach:

Defining a clear understanding of the business objective and how is technology playing a role in unlocking that value. This involves a careful review of Current business information, business objectives and defining L1 – L2 (Level 1 to Level 2, as necessary). The value definition typically defines the technology solutions available to drive productivity & automation. The final report is a recommendation of



Business, Industry & Competitive Analysis

- Business Overview & Strategic Objectives
- Acquisition Targets
- SWOT Analysis
- Business Structure (Corporate/Division)

➤ **Competitive Landscape:** a through Analysis of the Competitors landscape where others may have embraced technology to gain a competitive advantage; Risk of not adopting newer technologies.

➤ **Employee Proficiency:** Assessment of employee's productivity including digital proficiency, collaboration of technology in their day-to-day work.

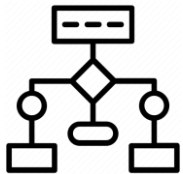
➤ **Business Processes:** Identification of business processes – manual and time-consuming, as well where technology could be leveraged to automate and streamline operations.

➤ **Technology Assessment:** Assessment includes current technology infrastructure with any outdated hardware and software systems, which are impacting efficiency and productivity.



Stakeholder Interviews

- Employee Proficiency
- Digital Literacy
- Information Availability
- Engagement & Retention Ploys



Process Mapping

- L1-L2 Process Mapping
- Capability Map & Measurements
- Scorecard Reviews



Application Inventory

- Tier 1 Application Portfolio
- Reference Architecture
- Built/Bought Analysis



Comprehensive analysis of the current state, technology infrastructure and its impact on business operations. Clear Identification of opportunities to transform leveraging technology.

Examples of Project Journey

01

*Business Overview &
Strategic Objectives*

02

*Technology Options
Analysis*

03

*Digital Strategy &
Business Benefits*

04

*Implementation
roadmap*


Business Overview & Strategic Objectives

Example Project Implementation

A North American construction company that has gone through major acquisitions in the last decade, but didn't scale technology to support the growth, resulting in extremely high G&A, low leverage on talent across divisions, extremely manual processes and reporting capabilities. This all resulting in low margins, and pressure on capital investments.

Business Structure (Corporate/Divisions)

The Hierarchy
The Hierarchy is the structure which allows multiple levels of Elements with the aim to link lots to them.



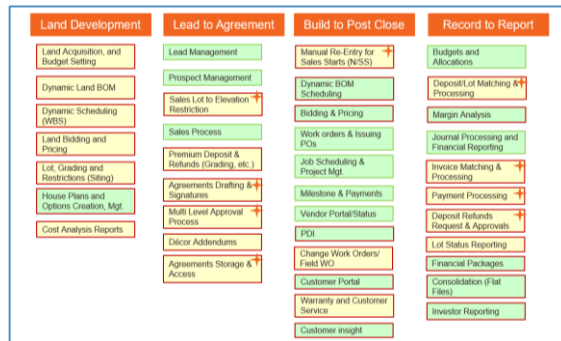
An Example Hierarchy for the POC

Corporate	Empire Communities
Domain	
Region	
Division	EA Homes LP
Area	
Market	Atlanta, Chattanooga
Master Community	Bill Lucas, Chosewood, Halcyon, Old Roswell
Land Phase	Harlow (Ph. 1), Harlow (Ph. 2), etc.
Community	Harlow East, Harlow West
Master Series	Halcyon (Ph 1 SF), Halcyon (Ph 1 TH)
Series	
Building	Harlow - Bldg. 57, Harlow - Bldg. 58, etc.
Building Level	
Product Type	

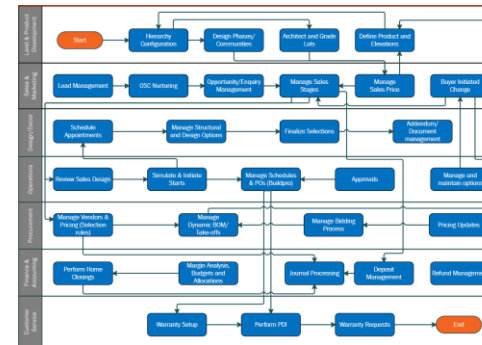
A hierarchy controls allocation of revenue and costs, as well helps us define management controls in the system at all levels.

Progress:
Corporate: Concept Established
Division: Concept Established

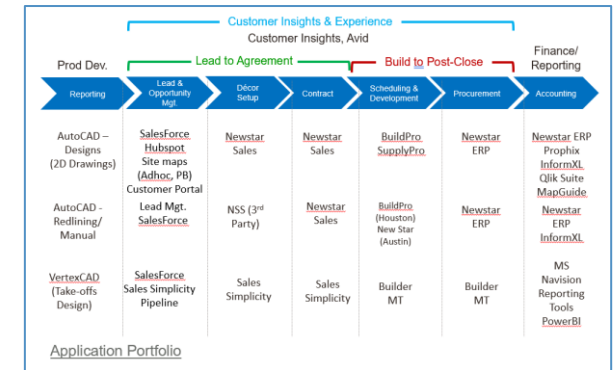
Process Capability Map



Process Mapping



Application Portfolio Mapping



Digital Transformation Value Statements

Standardize ABC Corporation End-to-end processes and policies and systems across the company to enable us to improve reporting capabilities, benchmarking and internal controls of our operations. Example Value Objectives:

1. Improve **operational efficiencies** by eliminating manual re-entry of Agreements, Budget Management, Invoices and Approvals.
2. Deliver a scalable solution that supports Business Growth and Profitability targets. Leverage talent across multiple divisions
3. Implement business controls in all key functional processes (current focus on Vendor Mgt. and Procure to Pay).
4. Automate accurate and timely reporting for business management.

Technology Options Analysis Examples

Fit Analysis

A full review of all the competitive landscape on technology options was created. This included understanding of the competitor platforms, as well a full assessment of the system components

Including:

- Containerization/Eco-system Analysis Security, Access Control
- Collaboration & Unified Workflows
- Integration & Middleware
- Scalability of Services
- Reliability & Service
- Business Functionality Fit

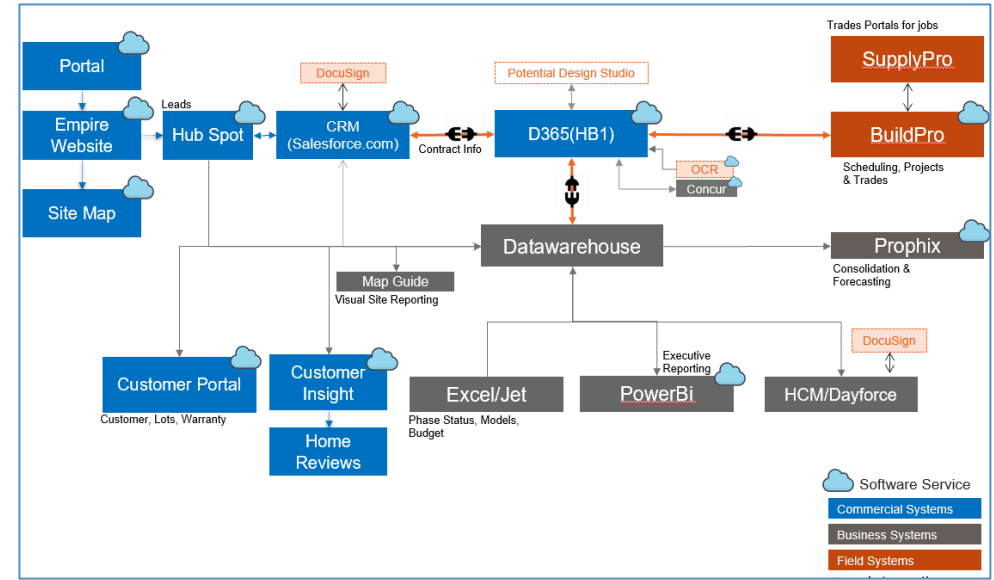
	PROCORE	HB1	HYPHEN	Mark Systems	Sales Simplicity + BuilderMT + Navision	NEWSTAR
Open-Source Languages (Accessibility through Browser/Mobile)	✓	✓	✓	✗	✗	✗
Containerization/Eco-system (Distributed multiservice applications)	✓	✓	✓	✗	✓	✓
Security, Access Control (Access Management through AD)	✓	✓	✓	✓	✓	✗
Collaboration & Unified Workflow (Completeness of the Solution)	✗	✓	✓	✓	✓	✓
Integration & Middleware (Ease of middleware/integration)	✓	✓	✓	✓	✓	✗
Scalability of Services (Active Product Development)	✓	✓	✓	✓	✗	✓
Reliability & Service (Established Professional Service)	✓	✗	✗	✓	✗	✓
Can Support Low-Rise & High-Rise	✗	✓	✓	✓	✗	✗

Integration Analysis

In order to drive full scale solution, it was critical to look at the entire application portfolio as a wholesome unit, driving information availability to all systems. A reference architecture was created to ensure that this analysis can show full view of information flow.

IT Support Teams were structured to drive functional support across the portfolio.

An example of a reference architecture is below.



A technology option was then recommended to consolidate all ERP systems, and to drive the benefits articulated in the project earlier.

Digital Strategy & Business Benefits

Digital Strategy Discussion

The selected software was then broaden to include the components of IT operations, and Cyber Operations. A full review consisted of looking at existing practices of project intake, Access controls and digital maturity framework assessment. We used a tool called Horizon Scanning to take a deeper dive at the elements at play to support the digital assessment. This includes a review of the following digital elements:

Horizontal Scanning (Digital Strategy)

- Talent Availability
- Customer Experience
- Technology Landscapte
- Regulatory requirements
- Supply Chain continuity.

#	Opportunity (in order of priority)	Initiative Name	Initiative Type	Owner	Month & Year (M-YY)	Month & Year (M-YY)	Expected Duration in Days
1	Opp2	Project ABC	People	Sam	2021-01-01	2021-02-26	56
2	Opp2	Project CBE	People	Joe	2021-02-01	2021-04-05	63
3	Opp2	Project CJE	Process	Bob	2021-03-01	2021-05-10	70
4	Opp2	Project CHI	Process	Craig	2021-04-01	2021-06-24	84
5	Opp2	Project XYZ	Technology	Steve	2021-05-01	2021-08-07	98
6	Opp2	Project BHI	Technology	Jim	2021-06-01	2021-07-13	42
7	Opp3	Project ZVE	People	Joe	2021-05-01	2021-07-03	63
8	Opp3	Project GJD	Process	Bob	2021-05-01	2021-07-10	70
9	Opp3	Project BNM	Process	Luke	2021-09-01	2021-11-17	77
10	Opp3	Project PLO	Technology	Sam	2021-09-01	2021-11-24	84
11	Opp3	Project ABK	Technology	Smith	2022-01-01	2022-04-09	98

Category	Macro Trend	Trend	Driver	Time to impact	Impact	Relevance	Recommendation
Talent Availability	Decentralized workforce	Trend 1	Driver 1	Less than 1 year	High	Low	Aware
	Hybrid workforce	Trend 2	Driver 2	1-2 years	High	Very High	Aware
	Diverse workforce	Trend 3	Driver 3	2-3 years			
	Skills gaps	Trend 4	Driver 4	3-5 years			
	Digital workforce	Trend 5	Driver 5	Less than 1 year	Very High	Very High	Adopt
	Multigenerational workforce	Trend 6	Driver 6	Less than 1 year	Moderate	Low	Aware
			Trend 7	Driver 7			
Customer Expectations	Personalization						
	Digital experience						
	Data ownership						
	Accessibility						
	Transparency						
Technological Landscape	AI & robotics						
	Virtual world						
	Ubiquitous connectivity						
	Genomics						
	Materials (smart, nano, bio)						
Regulatory System	Market control						
	Business models						
	Digital regulation						
	Consumer protection						
	Global green						
Supply Chain Continuity	Resource scarcity						
	Sustainability						
	Supply chain digitization						
	Circular supply chains						
	Agility						

← Adoption Drivers form Digital Strategy ←

Business Benefits Articulation

Once all the initiatives including ERP Project, Process Changes, Business Controls, Digital Maturity adoption processes were mapped, a well articulated benefits chart was devised with clear investment & ROI calculation, that was easy to understand and provided pay back period and both **direct & indirect benefits**.

Example Business Benefits Calculation

Indirect Benefits	Direct Benefits
<ul style="list-style-type: none"> Improved Financial Controls > More actions in the systems would minimize human errors > Scalable Approvals through System of Authority & Accountability. Scalability & Growth Target growth with minimal increase in headcount > Improved Project Management and Execution > Estimates, Bid and Risk Management > Reporting and Analytics that facilitate proactive and informed decisions Transform Corporate Functions > Reduce transactional and reporting effort/focus > Increase effort/focus on Business Support/Advisory > Advise strategy, investments, technology innovation, cost control, investments, acquisitions, operational, compliance 	<ol style="list-style-type: none"> Cost Savings of Annual ERP Costs: Estimated USD ~140,000 (CAD 174,500) Redeployment of resources through automation: <ul style="list-style-type: none"> NSS/Sales Simplicity Manual Re-entry + Cancellations: ~1550 Contracts (~20 Minutes) Agreements Approvals (Margin Reviews): (15-20 Minutes) Agreements Lines review for Customer Service + Deposits Review (15-20 Minutes/Agreement) Invoice Entry (~12000 Invoices) Invoice Approvals/Manual follow-ups (15-20 Minutes per Invoice) Manual Deposit Matching (Finance Controls missing): 10-15 Minutes/Deposit. Manual PO Matching (Finance Controls missing): 20 Minutes/PO. No PO payments Payment Process* (Checks): Average cost to produce/deliver \$65/Check. Budget Reforecasting Entries (20-25 Minutes per Entry) Consolidation Reports & Files (Creation & Entry): 6-8 hours of effort Support with Reporting on Rebates & Buying leverage: 2-4 hours Other Reporting efforts (GL/Major Codes Mapping etc.): 16-20 hours of efforts by division

Calculation of Direct & Indirect Benefits

Description	# of Res	Details	Annual Costs (2022)	Program Costs (Ramp down (7.5 Years))
D365 Onshore (Harman)	4	Blended Costs (\$32/H)	216,000	\$40,000 Ramp-down to 2 Resources
DXC Consulting & Integration	3	1260 Hours DXC Solution Consultants	378,000	585,000 1950 Hours
Program Team Contracts	1	SKU Standardization/Data	77,000	192,500
Travel/Other	6	Trips + any consultant travel	48,000	72,000
Overlap Lic. (D365-Existing)	20	Licenses (Atlanta) Commitment	41,544	83,088
Sandbox Environment	2	Environments additional (SB, QA)		Capex licensing
Estimated Program Costs:			760,544.00	2022: 760,544 2023: 529,900 2024: 182,144

Organizational Capability needed to support the program (3 Backfills)

Implementation Team (Backfill)	1 Leader
	1 Accounting & Low-Rise Backfill (Canada)
	1 Low-Rise (Procurement)
	01T Functional Resources (Tameia, Kelly)

Key Assumptions:

- Resources can be made available for the program as at Jan 1st, 2022
- Backfills would be needed up to 3 years as the process, workflows & change stabilizes.
- Training & skills would ultimately be transferred to the appropriate functions.

One time Costs

Note	Microsoft	DXC H&I	Total
Teams Sales Admins, Structural & Custom Options, Sales Pricing, PDI, Estimation, Site Admins/Sups, Change Approvers, Contracts Admin, AP Posting Invoicing, Document Approvers, Customer Service	\$8	\$8	\$16
Activity System Admins, Studio Consultants, Options Quotes, Procurement, Construction, Land Phase Releases, Procurement, take-offs, Budget Maintenance & Closing coordinators	\$50	\$35	\$85
Finance Full License, All Master Data Mgt, House Plan Admins, BOMs, Prices Setup, Finance Administration, Tax Entities, Consolidation, Insurance, AR, Full AP access, including Approvals	\$180	\$100	\$280

	Corporate	Canada (LR)	Canada (HR)	Atlanta	NC	Texas (HECL)	Total	Amount (\$) Per Month
Teams (\$16)	5	54	22	28	30	42	181	2,896
Activity (\$85)	10	42	20	30	15	45	162	13,770
Finance (\$280)	20	22	12	16	10	16	96	26,880
Totals	35	118	54	74	55	103	439	43,546

Annual Estimate(USD):

Licensing Costs: 43,546 X 12: 522,552

Additional Environments (Sandbox/QA): (\$1350/Month – 2 Env.) 32,400

Back-up & Administration (10%): 52,500

Total Estimate(USD): 607,452

Ongoing Costs

Annual Estimated Productivity Savings: **\$427,000**

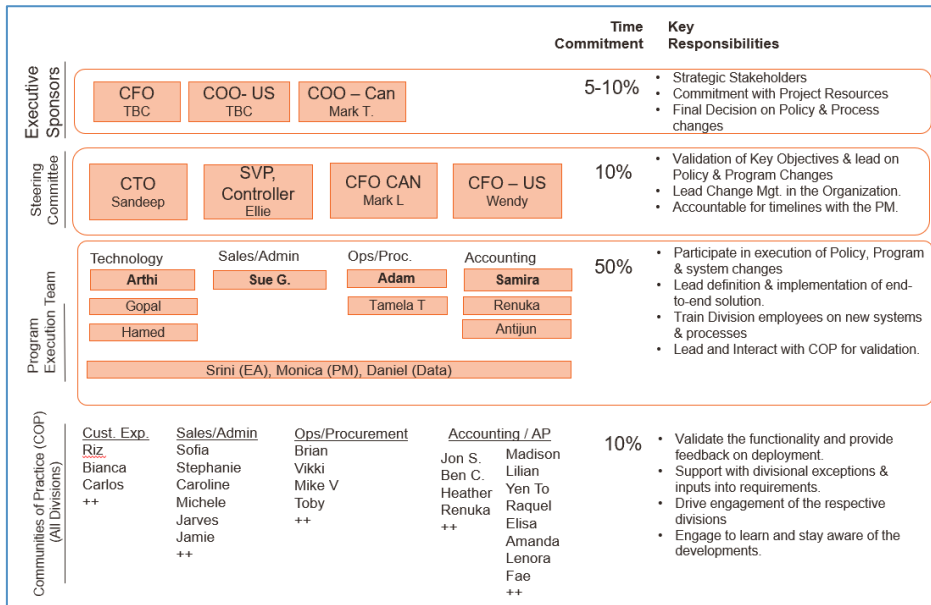
Return on Investment: **3.5 Years**

Implementation Roadmap Example

Program Structure

To lead the program through Organizational Change management, engagement and rigor, a steering committee was formed to drive execution through a dedicated Program team.

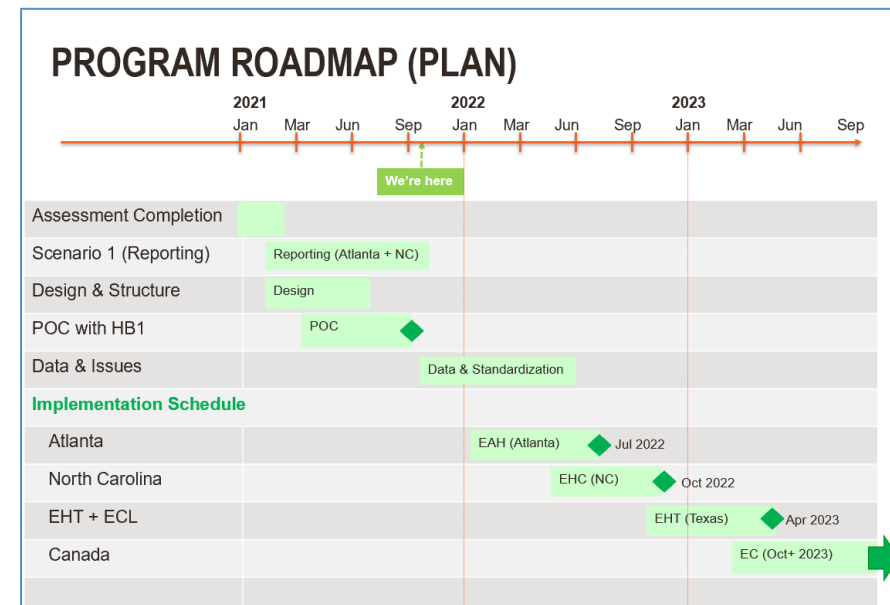
The responsibilities of this team was documented clearly, along with the communication mechanisms and Project Management capability



Program Roadmap

A multi-year roadmap was created to support the implementation rigor with delivery milestones that would allow the functional teams to take advantage of the new digital functionality by process areas and other avenues for productivity & automation.

This roadmap is being executed upon currently. (Feb 2023)



Roadmap to Dx Proposal Journey



Key Deliverables

1. Questionnaire pre-calls
2. Notes post-calls
3. Pre-solutioning Assessment Report

1. Assessment Scores
 - a. Information
 - b. Application
 - c. Security
 - d. Digital Transformation
2. Action Plan
3. L1 Process Mapping

1. Draft & Final Reports
2. Solution Signed-off
3. Vision & Project Plan
4. Execution Plans and timelines

Thank you

If you have any questions or comments regarding the digital adoption plan and deliverables, please don't hesitate to contact:

sales@inteltum.com
Inteltum Consultancy Inc.