

Strategic Initial Assessment™  
A roadmap for your IT future.  
2004



**STRATEGIC**BALANCE  


**Leverage your ERP investment... fully.**

**Lessen risk.**

**Increase productivity.**

**Find the balance...**

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## Company Overview

Strategic Balance is built upon the foundation of decades of experience in the disciplines of business analysis, business consulting and successful ERP implementation work. Founded in 2001 by John Cholewa, who himself brings fifteen year of experience to the company, the Strategic Balance team consists of a best-of-market collective of mature business, application and technology consultants.

Specializing in services for the J.D. Edwards ERP customer base, Strategic Balance has the talent, well-refined methodology, process centricity and implementation experience required to enable success in projects of any scope or complexity.

## What is a Strategic Initial Assessment™?

A close-up photograph of a stack of US dollar bills, showing the texture of the paper and the green ink of the currency. The bills are slightly out of focus, creating a sense of depth.

Many consulting companies offer similar services. Audit, discoveries, assessments... from "free" audits to being bundled with an implementation. At Strategic Balance, we have developed our Strategic Initial Assessment to be an intense, brief, objective and holistic view into your business processes and the IT system that supports them. To do so, they must be a stand-alone investment for your company. They require the full engagement of your management team and process leaders. Unambiguously, we assure that each SIA will deliver at least twice the investment in process improvements and overall cost savings.

A Strategic Balance SIA generally occurs within one workweek. Executed by a select team of SBC consulting resources, we will have a completed report in your hands upon the conclusion of the SIA. If appropriate, we are happy to make a presentation to your management team regarding our findings.

## *When is an SIA a good idea?*

You may be in the late stages of an ERP software selection process. A Strategic Initial Assessment® can be the best path in seeking the guidance required in finalizing your software selection and hardware/infrastructure requirements.

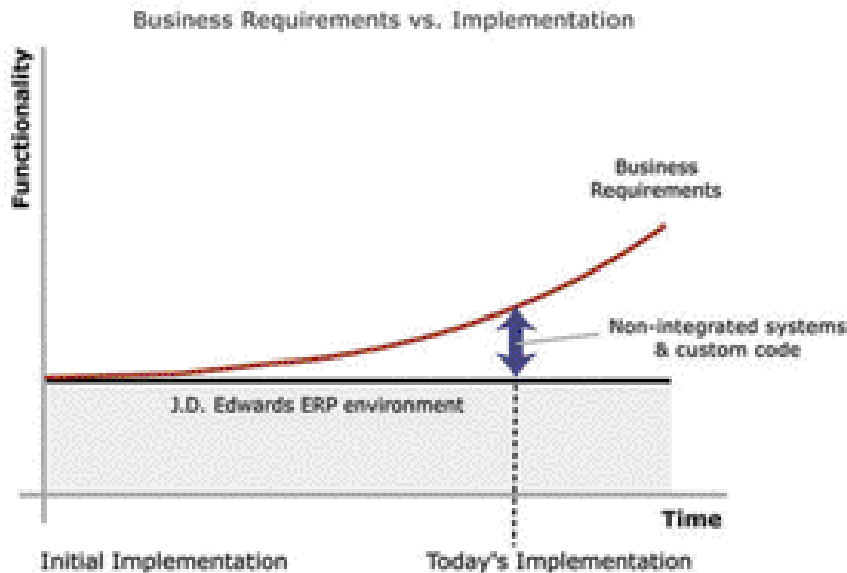
You may be in the position to request implementation proposals. Based on solid knowledge of your business requirements and existing process design, your company can be fully equipped to mount an informed RFP with the results of our comprehensive assessment. The SIA report can include enhanced business process models, risk assessment, timeline and potential project team members.

Your company may simply require more ROI from your existing enterprise system.



As time passes, your company's business requirements continually change. The configuration of your ERP system generally does not. Obtaining a clear snapshot of the gap between your system's functionality and your business requirements can be the foundation for getting more of what you paid for. Further, to reduce or eliminate manual overrides and band-aids added to your system over time.

The general purpose of the assessment will be to identify the key processes that can benefit from the ERP upgrade, create a roadmap for hardware and software selection and outline a go-forward strategy that will save you significant time and cost. In addition, this audit may highlight complimentary products that will assist you in improving their competitive position, and/or reducing costs.




## Strategic Initial Assessment Process

### Step 1: *Perspective Change*

Change the client's view of the organization to a business process perspective instead of a traditional departmental, or J.D. Edwards Module perspective. For example, the Order to Cash process cuts across multiple departments, and utilizes many J.D.E functions from Sales to Inventory to Financials. Making changes to inventory availability calculations only makes sense if the change enhances the process's overall throughput or bottom line impact.

The Strategic Initial Assessment<sup>®</sup> will, in part, consist of interviews with key personnel from each department to uncover potential issues, inefficiencies and strengths that exist in their current departmental operations. The information collected during the interviews is documented in a matrix tool that assists the Strategic Balance team in re-organizing departmental survey information into a business process orientation.

## ***Step 2: Recommendations***



Using the matrix, business processes with the greatest opportunities are highlighted and potential solutions are noted. The solutions offered may be oriented toward a new technology solution, or may show where expanded, or different use of J.D. Edwards functionality could be employed to enhance a client's execution of a given business process.

The high-level process recommendations in the Strategic Initial Assessment<sup>®</sup> can in many cases be implemented immediately by the client, or with minimal consulting assistance. Beyond quick fixes, the business processes identified during the assessment as highest impact, and in greatest need of repair may be candidates for a more focused analysis in a next step engagement.

## ***Step 3: Education***

Now that the Strategic Balance team and the client have a clearer idea of which business processes stand to gain most from a technology solution, it's appropriate to present some technology product options to get a look at what the final solution might be like. At the conclusion of the Strategic Initial Assessment<sup>®</sup>, a product and functionality overview will be presented with the findings of the assessment interviews.

## ***Step 4: What's Next?***

Planning for how to get the right solution implemented requires detailed understanding of a client's business and its associated business processes. The Strategic Initial Assessment<sup>®</sup> has to this point helped the Strategic Balance team and the client make significant decisions as to which business processes hold the greatest opportunity for a technology based solution.

For most clients, the assessment will have identified a number of significant problems where a simple J.D. Edwards functionality can be implemented. In addition, some business processes will have been found to require further analysis. These business processes may hold enough opportunity to warrant a more comprehensive analysis where all opportunities with a business process can be identified and prioritized.

## Strategic Initial Assessment™ Deliverables

### 1. Interview Documentation Matrix

- Documentation of departmental interviews to uncover issues in current departmental operations
- Sorted by business process
- Technology opportunity type (e-Business, data collection, OneWorld...) identified for issues, where applicable

### 2. Process Solution Summaries

- From the collection of notes, sorted by major business processes, areas that most need improvement are summarized. Summaries include the following sections:
- Perceived Problems/Opportunities
- Potential Solutions/Approach
- Technology solution potential

### 3. Technology Opportunity Summaries

- From the collection of notes, issues that will benefit from a technology solution are summarized along with descriptions of potential solutions.

### 4. Technology Education Presentation

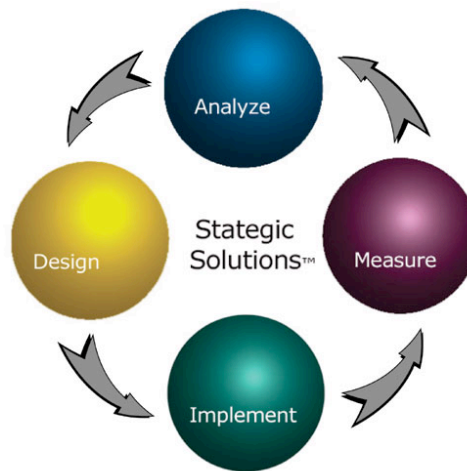
- At a Strategic Initial Assessment` wrap-up meeting, a high-level technology overview will be given.
- Topics to be covered may include:
- Internet enabled business processes (Order entry, order status inquiry, inventory level inquiry...)
- OneWorld Migration strategy planning
- OneWorld functionality and new applications



### 5. Next Steps

- "Quick-Hit" opportunities may be identified and presented to the client in the wrap-up session including:
  - Client performed system adjustments
  - Hands-on education workshops
  - Quick-Fix consulting engagements

- The next step for business processes found to be most out of synch with the current business requirements is a Strategic Process Analysis'.
  - In-depth analysis that will focus on up to five business processes
  - Documents 'As-Is' process and business requirements end-to-end
  - Identifies and prioritizes all opportunities within a process using client's decision criteria
  - Detailed plan and engagement letters for top opportunities



## It's About Partnering Relationships...



At Strategic Balance, we believe in building enduring client relationships that feel much more like partnerships. Working toward a common goal. Looking out for each other. Working in synergy rather than in cautious distance. These are the ingredients required for success. To build something special. To perform above the norm.

We invite you to be our client, and our partner.

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