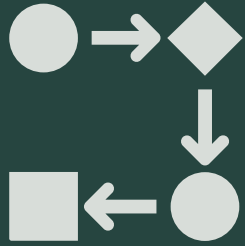


Technology Adoption Methodology

Implementing technology solutions
in line with the business need.



Three Phases



Business Design

- Strategic Alignment
- Technology Roadmap
- Success Planning
- Current State
- Process Redesign
- Data Preparation
- Technology Selection
- Vendor Negotiation



Technology Deployment

- Project Management
- Communication
- Vendor Management
- System Design
- Configuration
- Data Preparation
- Testing
- User Training
- Go Live



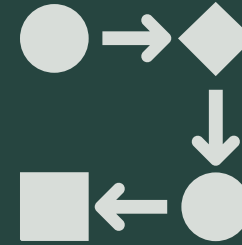
Business Adoption

- Business Rollout
- Measure & Reinforce
- Transition to Operations
- Close Process Gaps

Business Design

Phase Goals

- Define business and operational needs
- Select solution aligned with strategic goals
- Document expectations in a vendor contract



Business Design

- Strategic Alignment
- Technology Roadmap
- Success Planning
- Current State
- Process Redesign
- Data Preparation
- Technology Selection
- Vendor Negotiation

Business Design

Activities (1/2)

1. Strategic Alignment

- Consider project priority
- Identify short and long-term purpose
- Identify target beneficiaries and impact
- Document the Business Case

2. Technology Roadmap

- Make vs. Buy
- Consider current solution capabilities
- Document outstanding requirements

4. Success Planning

- Lay groundwork for transformation
- Determine SMART project metrics
- Document Success Plan

5. Current State (CS)

- Document CS processes
- Consider CS:
 - Key Performance Indicators (KPIs)
 - Reports to support business decisions
 - Skills, knowledge, and roles needed

Business Design

Activities (2/2)

5. Process Redesign

- Design Future State (FS) processes
- Consider CS constraints and pain points
- Determine skills needed for FS

6. Data Preparation

- Consider data conversion
- Identify and assess current reports
- Identify additional required reports

7. Technology Selection

- Draft RFP based on requirements
- Identify vendors and release RFP
- Host vendor demos and Q&A sessions
- Assess proposals with Vendor Decision Matrix

8. Vendor Negotiation

- Negotiate contract and deadlines
- Include in contract:
 - Expectations, protocols, SLAs
 - Vendor contact information (2x)
 - Overage/Change Management



Technology Deployment

Phase Goals

- Follow Project Management approach
- Ensure requirements implemented
- Go live with new technology



Technology Deployment

- Project Management
- Communication
- Vendor Management
- System Design
- Configuration
- Data Preparation
- Testing
- User Training
- Go Live

Technology Deployment

Activities (1/2)

1. Project Management

- Scope and schedule management
- Cost and quality management
- Risk and Issue management
- Vendor management

2. Communication

- Establish communication standards
- Consider all stakeholders
- Weekly status reports

3. Vendor Design

- Review FS with vendor and SMEs
- Obtain vendor design and wireframes
- Revise and sign-off design

4. Configuration

- Cyclical build and sign-off
- Collect SME input and approval
- Hold sprint reviews w/ stakeholder demo
- Collect stakeholder signoff on deliverables

Technology Deployment

Activities (2/2)

5. Data Preparation

- Identify and record CS/FS data types
- Design FS reports and dashboards

6. Testing

- User Acceptance, Integration, System, and Operational Testing

7. Training

- Consider People, Process, and Tech

8. Go Live

- Pilot, if of value
- Mitigate risks

Business Adoption

Phase Goals

- Establish system use and maintain
- Identify and address resistance
- Transition responsibilities to process owners
- Implement continuous improvement



Business Adoption

- Business Rollout
- Measure & Reinforce
- Transition to Operations
- Close Process Gaps

Business Adoption

Activities

1. Business Rollout

- Drive system adoption
- Celebrate wins, maintain focus, remove roadblocks
- Demo commitment of leadership

2. Measure & Reinforce

- Set clear and consistent expectations
- Measure performance diligently and visibly
- Reinforce through correct behaviour
- Overcommunicate the vision

3. Transfer to Operations

- Project handoff to operations
- Track lessons learned
- Archive documentation
- Establish defect and enhancement process
- Celebrate!

4. Close Process Gaps

- Use Continuous Improvement practices
- Empower operational staff
- Track changes and meet SLAs