Planning a Successful Enterprise Performance Management Rollout

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Juan Porter – Experience Overview

- President & Founder of TopDown Consulting
- Over 25 years experience delivering EPM solutions to numerous Fortune 1000 clients across more than 20 industry verticals
- Specializations include enterprise performance management, business intelligence, data warehousing, technical architecture, and master data management
- Regular blogger, frequent speaker, and contributor to various industry publications
- Chairman, OAUG Hyperion SIG
Representative Sample of Clients

- Adecco
- AT&T
- CoBank
- DirecTV
- E*Trade
- Estee Lauder
- Franklin Templeton
- Group 1 Automotive
- HSBC
- Iron Mountain
- QAD
- Pella
- Shutterfly
- Take-Two Interactive
- Wachovia
- Washington University School of Medicine
Planning the project

“Go Slow to Go Fast”
Understanding the Project Phases

• Create strategic vision  
  • Analyze current solution & processes  
  • Perform gap analysis  
  • Identify risks & challenges

• Setup environment  
  • Build solution  
  • Develop integrations  
  • Unit testing  
  • Validate data

• User training  
  • Go-live  
  • Support

• Identify requirements  
  • Define scope & objectives  
  • Obtain executive commitment  
  • Design applications, data integrations, reports

• Integration Testing  
  • UAT  
  • Performance Testing

• Project review  
  • Measure success  
  • Lessons learned
What is a Strategic Roadmap?

A Strategic Roadmap is a comprehensive framework envisioning, developing, guiding, and measuring project initiatives—

- Establish Strategic (End State) Vision
- Identify Project Goals & Objectives
- Current State Assessment & Architecture
- Recommended Implementation Approach and Scope
- Preliminary Design
- High-Level Project Timelines
- Resource Requirements
- Preliminary Cost Estimates
- Identification of Risks and Challenges
- Definition and Measurement of Success Factors
## Success Factors

<table>
<thead>
<tr>
<th>Audience</th>
<th>Tangibles</th>
<th>Experience</th>
<th>Realize</th>
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</thead>
<tbody>
<tr>
<td>Executives</td>
<td>- Ability to perform “what-if” scenarios quickly</td>
<td>- Confidence in reports</td>
<td>- Report earnings in ?? days</td>
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<td></td>
<td>- Monthly close efficiencies</td>
<td>- Improved analysis and forecasting</td>
<td>- Forecast more accurately</td>
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<td>- Shorten planning cycle</td>
<td>- Compliance</td>
<td>- Reduce audit fees</td>
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<td>- Execs using Dashboards</td>
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<tr>
<td>Project Team</td>
<td>- Go Live on schedule</td>
<td>- Deliver project on time and within budget</td>
<td>- Set target date and budget</td>
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<td>- Get internal recognition</td>
<td>- Become self-sufficient</td>
<td>- Reduce maintenance by ??</td>
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<td>- Improve data quality</td>
<td>- Simplify processes</td>
<td>- Reduce errors by ??</td>
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<tr>
<td></td>
<td>- # of users on solution</td>
<td>- Make users happy</td>
<td>- User satisfaction rating</td>
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<td></td>
<td></td>
<td></td>
<td>- Measure ROI</td>
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<tr>
<td>End Users</td>
<td>- Ability to perform “what-if” scenarios quickly</td>
<td>- Easy of use</td>
<td>- Identify amount of time saved</td>
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<td>- More time spent on analysis, less on data entry</td>
<td>- Better access to data</td>
<td>- Improve accuracy</td>
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<td>- More timely reporting</td>
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<td>- Less manual input</td>
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<tr>
<td>IT</td>
<td>- Reduce cost of IT support</td>
<td>- Stable environment</td>
<td>- Supportable</td>
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<td>- Verify compliance</td>
<td>- Integrate security</td>
<td>- Achieve internal standards</td>
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<tr>
<td></td>
<td>- Ability for internal team to support solution</td>
<td>- Fits internal standards</td>
<td>- Measure performance</td>
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<td>- Compliance</td>
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Why Do You Need a Roadmap?

- To create an internal understanding of how your current solution/process works
- To identify opportunities for improvement and recommended future state systems and processes
- To map out an overall implementation approach with a series of achievable initiatives and project wins
- To improve communication by establishing a common vision and vocabulary
- To describe the benefits desired from the proposed solution and identify the measures of success
- To achieve a measurable return on your investment
Leading Practices

- Clearly define vision
- Driven by CFO, supported by CIO
- Understand that ERP is not the only source of data
- Use technology for its intended purpose
- Involve the users
- Know what’s needed and how it will be used
- Challenge the current state – encourage change
- Identify risks and how to mitigate
- Communicate
Successful Change Management = User Adoption

- Socialize vision, solution, and new processes
  - Leverage Executive support
  - Identify thought leaders (cheerleaders and detractors)
  - Get buy-in from users at all levels
- Listen / Empathize
- Communicate with and involve users throughout project
- Capture their concerns and ideas
Requirements

- Identify and document requirements
  - Business, Users, and IT
- Evaluate against business purpose
  - Why is a requirement required?
  - How does it help the process, provide insight, or improve the ability to manage?
- Resolve conflicting requirements
- Develop high-level design and key benefits
- Socialize
- Approve
Design the Solution

- Review Roadmap and Requirements
  - Make sure everyone on same page
- Separate processes
  - Identify dependencies and key steps
  - Determine accountability and ownership
- Define solution structure
  - Dimensions, Business Rules, Integrations, etc.
- Develop prototype to visualize solution
  - Increase understanding and support
  - Mitigate resistance
- Create Design Document and Project Plan
- Establish Communication Plan
Client Examples
Sample Goals & Objectives

- To achieve a shared understanding of potential opportunities & areas of improvement
- Eliminate redundant repositories of data
- Improve reporting performance and usability
- Increase confidence in the numbers
- Leverage existing investment in ERP and other data systems
- Create self-serve reporting environment where users focus on analysis, not generating reports
- Reduce administrative complexity by providing automated solutions where possible
Current State Assessment

- Evaluate current processes
  - How did our current process evolve over time?
  - What do we like about the current process?
  - What do we dislike about the current process?

- Determine what information you need to manage, and how you want to measure it
  - What’s important?
  - Alignment with corporate goals and objectives

- How is this maintained / updated
Current State Architecture
Possible Risks

- Data availability, cleanliness, comparability, and integrity
- Resource availability
- Change in reporting requirements
- Change in organization priorities
- Dimensionality differences among ERP, DW, HFM, and Essbase
# Project Timeline & Resources

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<th>Month 1</th>
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Execute and Deliver
Build the Solution

- Implement the established design
- Follow the project plan
- Closely monitor project
  - Resources
  - Effort to complete tasks and project
  - Budget
  - Contingencies
- Communicate any changes to design immediately
  - Review with stakeholders and obtain sign-off
- Maintain transparency
  - Acknowledge success and milestones
  - Bad news does not get better with time
Application Development Cycle

- Accounts
- Entities
- Scenarios
- Time
- Custom

- Data Entry Forms
- Formulas & Business Rules

- System Reports
- Load Data
- Security

- Testing

- Standard Reports
- Adhoc Analysis

- Training & Rollout
Testing the Solution

- Establish testing processes and identify participants
- Types of testing
  - Integration Testing
  - Performance Testing
  - User Acceptance Testing
  - Parallels
- Process
  - Prepare tst environment
  - Develop test scripts
  - Train “testers”
  - Perform test
  - Collect results and make changes as needed
  - Approve results
Deploy to Users

- Prepare the organization for Go Live
- Transition will demonstrate adoption of solution
- Preparation:
  - Build sign-off
  - Develop training materials
  - Confirm logistics for training
  - Internal resources are designated for training
- Process:
  - Constant knowledge sharing with the organization’s users
  - Create the training plan and documentation
  - Deliver the training
  - Determine post-implementation support plan
Review & Assess – Quantify Success

- Measure achievement of critical success factors
  - Not all improvements are realized at Go Live
- Demonstrate predicted benefits of the project to stakeholders
- Build momentum within the organization to begin next phase of the Strategic Vision
- Capture lessons learned during project
Common Pitfalls
Common Pitfalls

- Effort to reconcile data
  - Data is never as clean as you might expect
- Internal Audit not engaged
- Lack of defined roles between
  - Finance and IT
  - Admin and Users
- New technology, same old process
- Underestimating change management
Questions? Comments?
Thank you

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