

# Gaining a Competitive Advantage with Your IT Roadmap



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# Managerial Priorities

- Pandemic has accelerated IT enabled digital transformation efforts:
  - Need for agility; work from anywhere at anytime as applicable.
  - Need for flexibility; adjust to a multi channel, multi modal method of product and service delivery.
  - Flushing out inefficiencies; eliminating silos through increased process integration efforts.
  - Improved decision making by better leveraging data assets.
  - Increased customer and supplier intimacy, portal and self serve features.
  - Realization that many of changes made will have a longer-term effect, new normal, shifts in work/cultural habits.
  - Need for improved risk management in an increasingly distributed and collaborative environment.

# Polling Question

# Technological Drivers

- Cloud Computing Strategies
- Financial/ERP Applications
- Collaborative Technologies
- Robotic Process Automation
- Analytics/Management Dashboards
- Cyber/Information Security Considerations
- IT Resources/Capabilities

# What is Cloud Computing?



Making computing resources available as a utility service  
Just like the National Electricity Grid

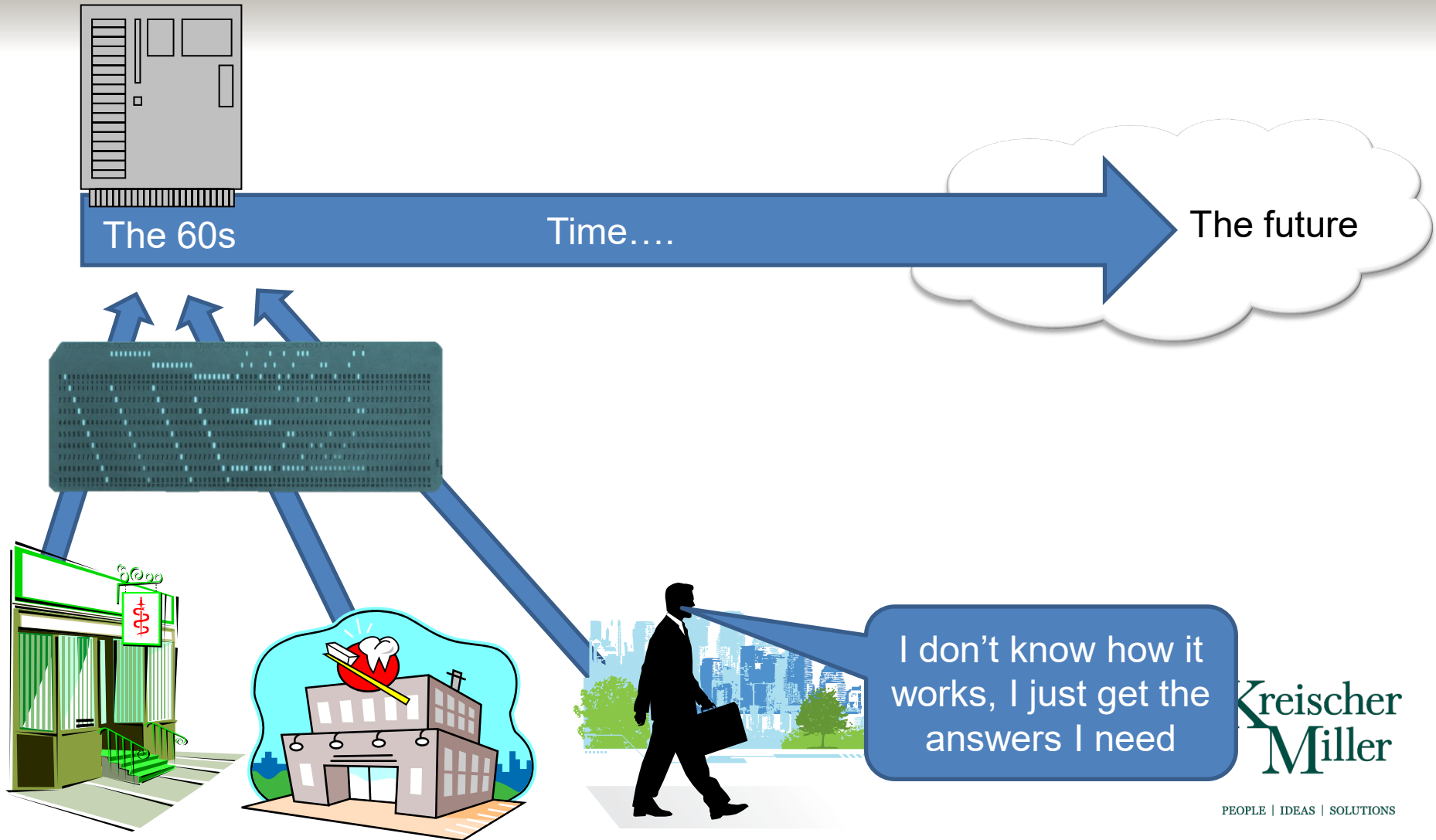
# Not All Clouds Are Right for You



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# So What's Changed?



# On-Premise Computing

- Requires hardware, space, energy
- Requires managing applications/updates
- Software licensing costs
- Difficult to scale
  - Too much or too little capacity
- High upfront capital costs
- You have control and responsibility



# IT Agility

- How quickly can you:
  - Scale up/down the infrastructure and applications?
  - Upgrade to the latest applications?
  - Respond to a merger and acquisitions with new requirements for business process and IT capacity?
  - Respond to changes in your business model?

# Cloud Characteristics

- Shared, multi-tenant environment
- Pools of computing resources
- Resources can be requested as required
- Available via the Internet
  - Private clouds can be available via private WAN
- Pay as you go
- Improved security posture

# Many Players in the Game

- To name a few
  - SaaS: Microsoft, Salesforce, Oracle, Cisco, Google Apps
  - PaaS: Microsoft, Force.com, Google App Engine
  - IaaS: Amazon, IBM, VMware
- Expect change, the cloud is just beginning...

# Polling Question

# Updated Financial/ERP Systems

- ERP and financial systems form the backbone of an organization's digital nervous system.
- All processes within an organization needs to be reflected in some shape or form within the ERP/financial system to enable capture of all activities and their impact on organizations performance.
- ERP systems and capabilities have evolved:
  - Core Operations to Finance additions
  - Customer and Supply Management
  - Analytics and BI evolution
  - HRIS and Social XRP enablement
- Outdated and poorly integrated/enabled systems pose a significant obstacle towards digital transformation!

# ERP Solution Approaches

## All-in-one

- Using one software solution to handle various facets of the company.

## Best of Breed

- Using several software applications and providers to satisfy the needs.

## Hybrid

- Using a core system with few other applications in support of business needs.

# Updated Financial/ERP Promise

- Process integration/efficiency (direct or API)
- Break down the silos, provide visibility
- Real-time information updates and alerts
- Access any where/time/device
- Less paper, more workflow
- Increased self service capabilities
- Software as a service, ease of IT management



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# Collaborative Technologies

- Leverages latest cloud computing capabilities
- Quick deployment, lower costs to maintain
- Enables building a distributed XXXXX
- Examples:





# Robotic Process Automation

- Many organizations have developed a patchwork of applications, with data being entered in multiple places and requests travelling via various tools ranging from manual reports and forms to emails and spreadsheets from one system to another in different ways.
- Robotic Process Automation, or as commonly referred to as RPA, democratizes automation through integration of all applications using a unified set of tools to eliminate non-value added activities while at the same time increase overall process efficiency, quality and scalability levels.



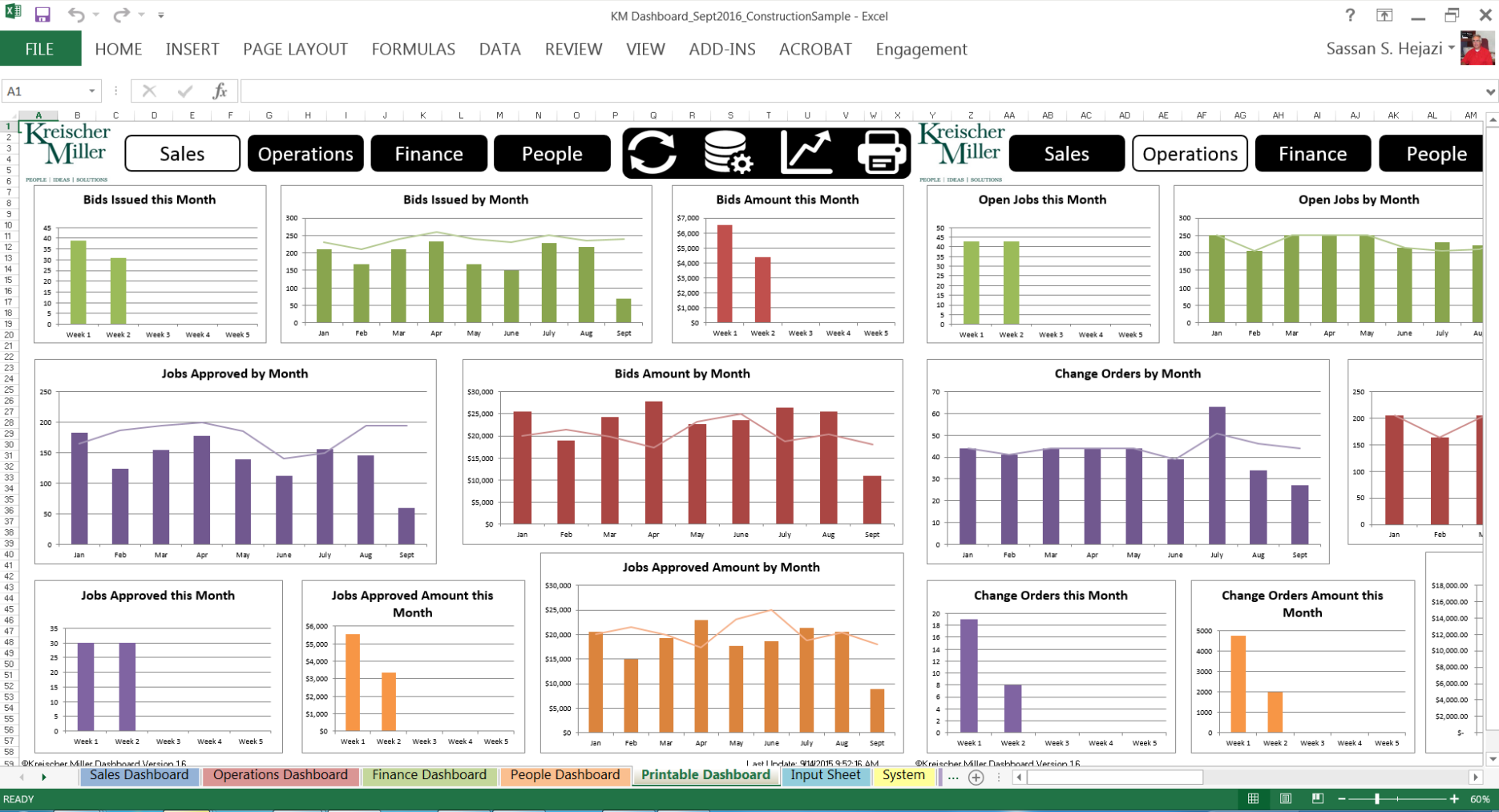
# RPA Examples

- Accounting & Finance – Payables and receivables processes. Automated reconciliation and financial close activities.
- Operations – Customer and vendor management, inventory automation, cycle counts, order fulfillment, quality tracking, job/project setups, project budget monitoring.
- Sales & Marketing – Campaign and outreach email management, brochure and content sharing processes, CRM automation.
- H/R – Employee forms, onboarding and termination processes, benefits management support processes.
- Executive Management – Business analysis, monitoring and reporting. Risk management and regulatory compliance support.

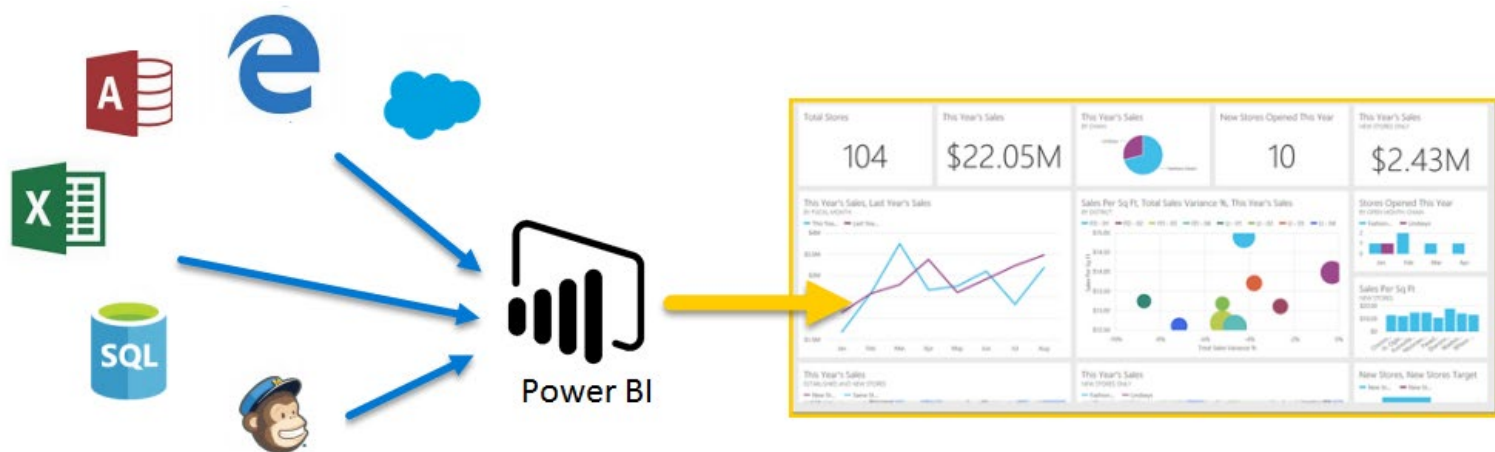
# Analytics/Management Dashboards

- Dashboards are enablement tools of business performance management in today's modern organizations.
- Dashboards have become popular due to recent advances in cloud and open interface technologies.
- Dashboards are used to report on KPIs in an effective manner in order enable management to keep everyone focused on achieving tangible results.
- Dashboards, when implemented properly, improve communication and accountability throughout the organization.

# Management Dashboards



# Microsoft Power BI



- Power BI is a collection of tools that work together to create customized reports, charts, and insights
- A wide variety of data sources can be used, not just those from Microsoft

# Dashboard Examples

- Opportunity tracking & management
- Sales performance & leaderboard
- Order fulfillment management
- Inventory & supply chain management
- Operational/outcome monitoring
- Project tracking & costing
- Workforce planning & utilization
- Product & customer segmentation analysis
- Financial metrics & forecasting

# Polling Question





# Middle Market & Information Security

- Increased frequency of attacks
- Limited internal resources
- Increased regulatory pressures
- Confusion among management regarding priorities, assuming IT is addressing it all!
- Lots of noise/offering in the IT vendor community
- Too many solutions resulting in less than desired results!
- Need for a unified methodology and approach



# Leveraging Frameworks



# Center for Information Security - Roadmap



**CIS**  
**CRITICAL**  
**SECURITY**  
**CONTROLS**

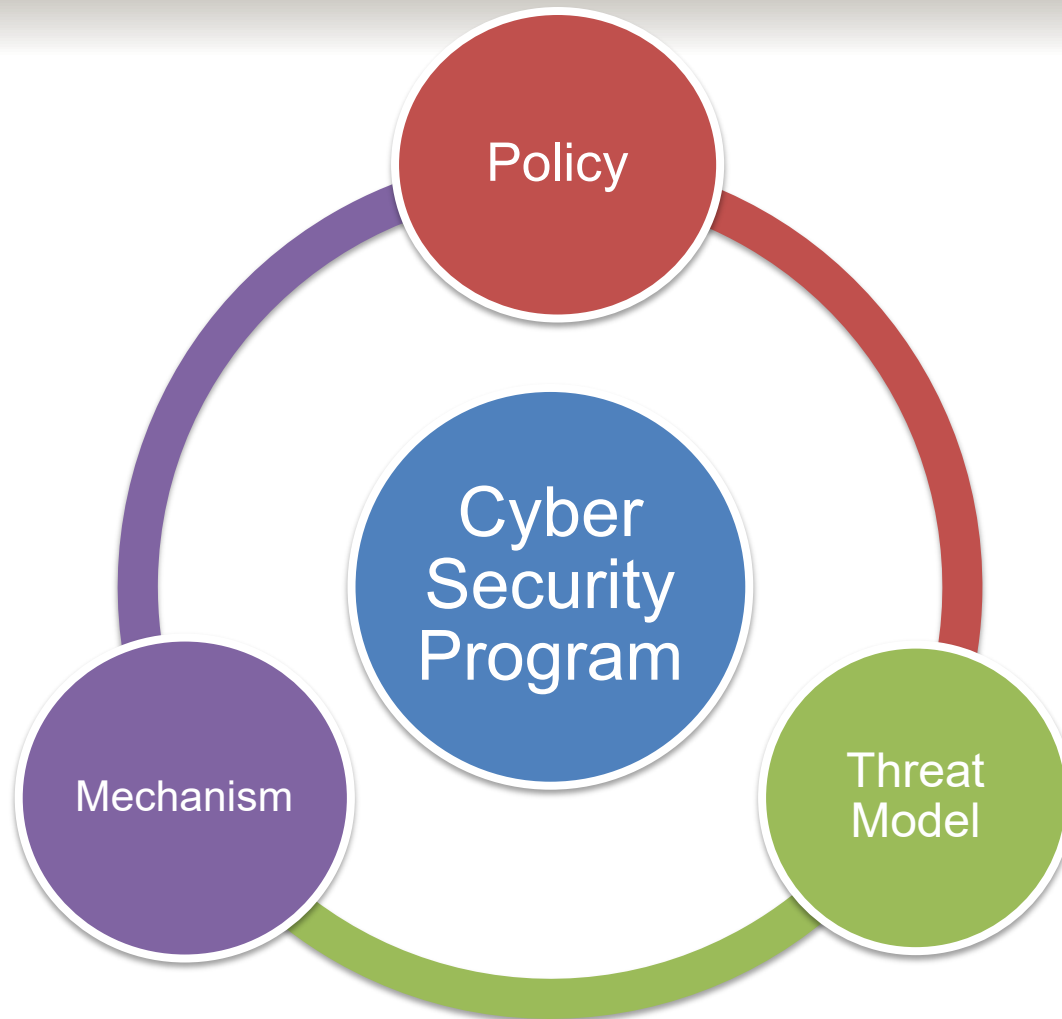
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# CIS Controls Overview



# Cyber Security Program Triad



# Polling Question

# IT Resources & Capabilities

- Middle market organizations leverage a combination of internal and external resources in support of their IT needs:
  - IT Coordinator Role
  - IT Management Role
    - Smaller IT Department
  - Managed Service Provider(s) Role
    - vCIO services
  - Specialized Resources Roles
  - General Management Roles
  - IT Governance/Oversight Mechanisms

# Management Diagnostic

- Are you using older or outdated business applications?
- Are most of your key systems still on-premise?
- Are your key applications difficult to integrate with one another?
- Are you dependent on tools such as Excel to address deficiencies?
- Are your systems cyber security and information privacy ready?
- Do you have strong/tested business continuity capabilities?
- Do we have the right mix/caliber of internal and external IT resources?
- Are your systems making your employees more productive?
- Are you providing self serve features to suppliers/clients?
- Are your systems helping you gain competitive advantage?



# Thank You for Attending!



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