

DESIGNING A TRANSFORMATION ROADMAP

Eric Sluss
Fractional CIO & Advisory

MAY 16, 2024
NYC

Presenter Introduction

I lead organizations through transformation journeys



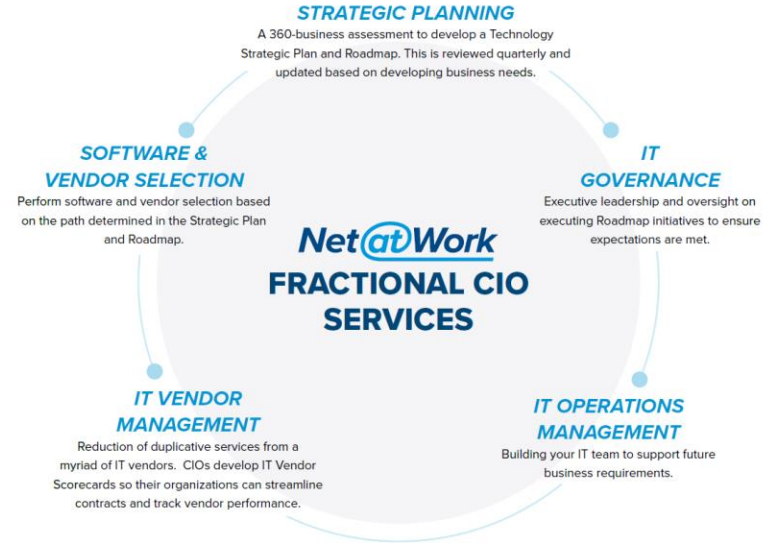
Eric Sluss

Fractional Chief Information Officer
Net at Work

Fractional CIO & Advisory Introduction

The chief information officer (CIO) oversees the **people, processes** and **technologies** within a company's IT organization to ensure they deliver outcomes that support the goals of the business.

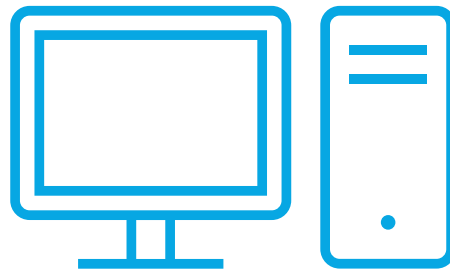
(Gartner)



CIOs lead organizations through **transformation journeys**.

The risk of being left behind

Some small and medium sized businesses (SMB) continue to operate with antiquated technology and business processes that were developed 15 years ago, or more



To compete in today's digital economy, SMBs need to embrace innovative technologies, streamline their operations, and adapt their business models for the digital age.

Defining a Digital Transformation

Digital transformation is the process by which companies embed technologies across their businesses to drive fundamental change.



Source: [Accenture](#)

Digital Transformation Benefits

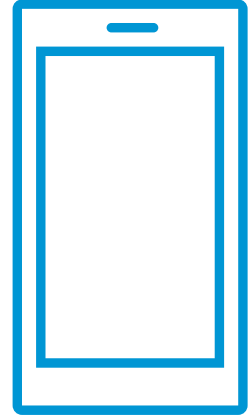
Organizations find that digital transformations:

- Facilitate growth
- Enable cost savings
- Drive more efficient operations
- Provide tools and technology that give insights and data-driven decision making
- Improve customer experiences



Digital Transformation vs. Process Optimization

Optimization focuses on streamlining processes using current technology.



Sage 100 and 300 were built for another age. Remember the 80s and 90s?

System Integrations

Painstakingly built by developers



Financial Reports

Static Financial Reports



Artificial Intelligence

Cyberdyne Systems Model T-800



Organizations can **optimize** their processes within legacy systems but are limited by these systems' constraints, hindering complete **transformation**

Digital Transformation Starts with Strategic Planning

80%

Of leaders feel their company is good at crafting strategy

But
Only...

44%

At its implementation

And
Only...

2%

Are confident that they will achieve 80-100% of their strategy's objectives

Source: [Bridges Business Consultancy](#)

Building for the Future

A Transformation Roadmap supports the strategic plan.



Strategic Plan

provides the vision
for the future

Where is your organization going?



Transformation Roadmap

provides the path to the future vision
by mapping the digital transformation journey.

How will it get there?

A roadmap visually maps out the People, Process, and Technology initiatives needed to achieve the organization's vision.

Strategic Planning Workshop

What are the top 3 changes your **customers** would like to see?

What are the top 3 changes your **employees** would like to see?



Transformation & the Strategic Planning Process

Process to Drive Results



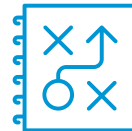
Current State Assessment

Identify the strategic profile and operating model of your organization today.



Strategic Planning

- Formulate a 5-year vision
- Develop goals
- Identify KPIs
- Develop a transformation roadmap



Transformation Roadmap Execution

- Execute the initiatives in the roadmap to get to the defined vision
- Track results against predefined KPIs

Sage focused roadmaps: Current State Assessment

People

- Are people trained?
- Are the right people in the right seats?
- Does everyone have roles and responsibilities?
- Are people capable of change as processes and technology change?
- Do people have the right tools?

Process

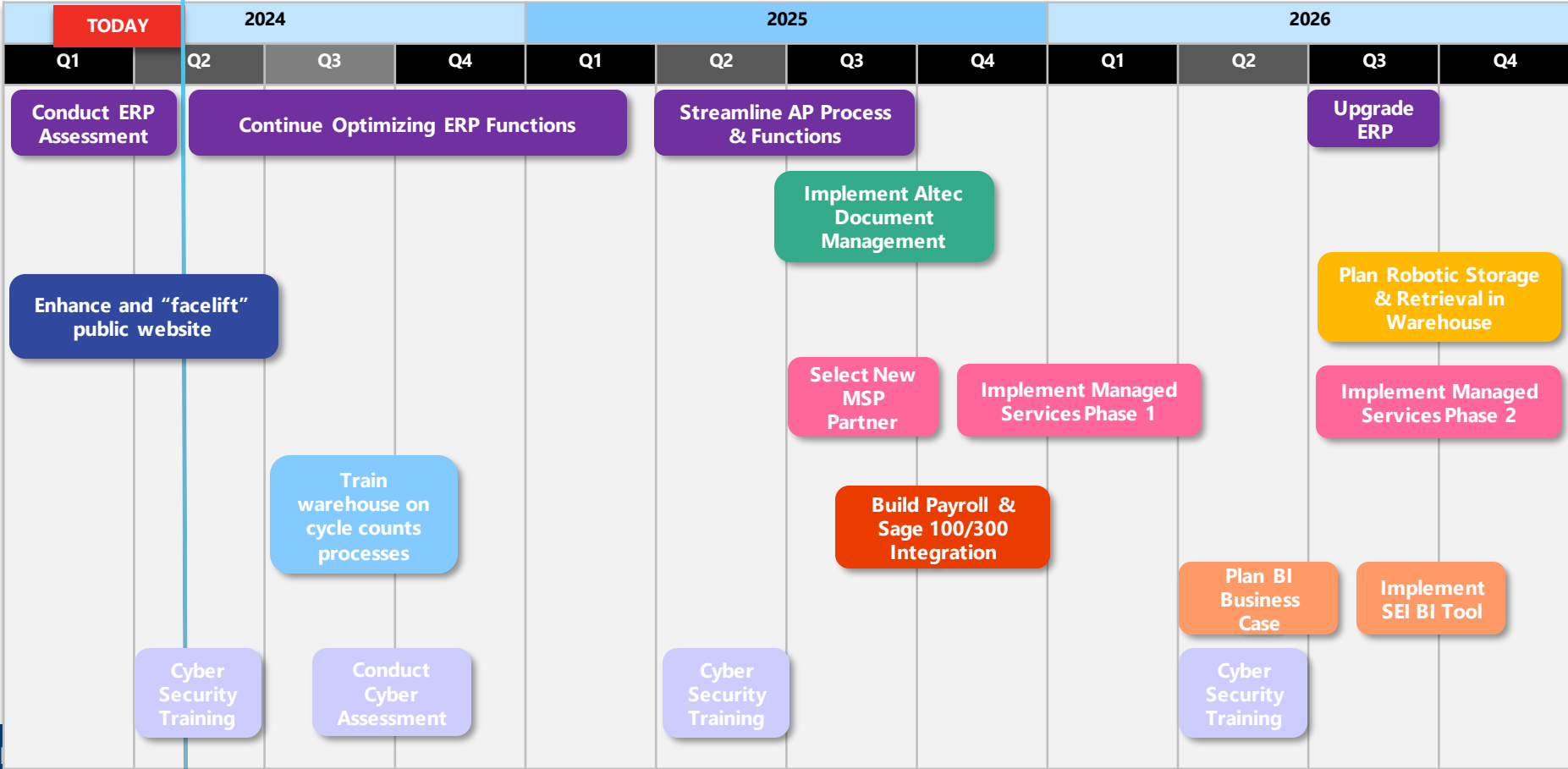
- Which processes work?
- Which processes need improved?
- Are there extra steps that can be removed?
- How do we measure each process?

Technology

- Do we have the right technology?
- Do we need new technology?
- Can our existing technology automate some of the process?
- Can our technology handle our growth?

A current state assessment gives your organization a realistic viewpoint of where you are today.

Sample Sage 100/300 Roadmap

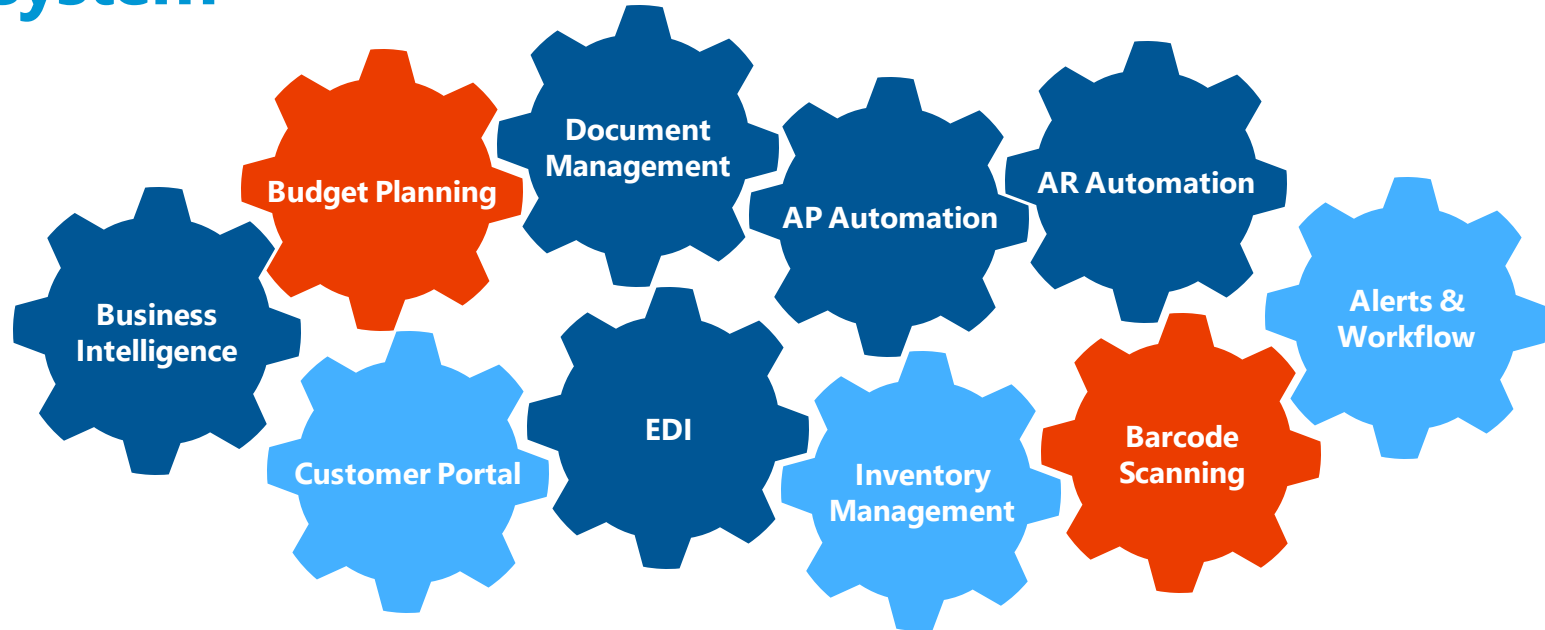


Sample Roadmap Investment

Identifying and budgeting for the costs of each initiative is a critical piece in the business case for each initiative.

Project	Dept.	Implementation Cost			Annual Recurring Fees
		2022	2023	2024	
Managed Service Partnership	IT	\$20			\$27
Implement ERP	Corporate	\$60			\$25
AP Automation	Accounting	\$40			\$7
Inventory Planner	Purchasing	\$28			\$12
Robotic Storage & Retrieval	Warehouse			\$320	\$47
Implement Payroll	Accounting	\$14			\$7
Implement Analytics	Corporate		\$68	\$8	\$24
Cyber Training	Enterprise	\$3	\$3	\$3	\$0
Total Implementation Cost		\$165k	\$71k	\$331k	
Total Annual Recurring Fees (Cumulative)		\$71k	\$98k	\$149k	

Sage focused roadmaps: Leveraging Sage Ecosystem



Sage has an extensive partner and ISV network with bolt-on applications to Sage's core ERP solutions.

Sage Focused Roadmaps: Considerations for Success

- Many organizations fail to **use existing Sage systems correctly** and do not **leverage the maximum capabilities** Sage offers
- Sage's ISV and partner network offers bolt-on applications to reduce implementation time, improve system compatibility and drive better ROI for Sage ERP solutions (Sage 100, Sage 300, Sage 500, Sage X3, Sage Intacct)
- **Measuring processes** helps to provide a business case for implementing changes
- Even small and medium businesses (SMBs) need to **practice change management**

A Sage focused roadmap minimizes costs and risks by leveraging solutions that are compatible with each other.

When organizations launch transformations, roughly 70% fail

Not having the expertise is a leading cause of failure.

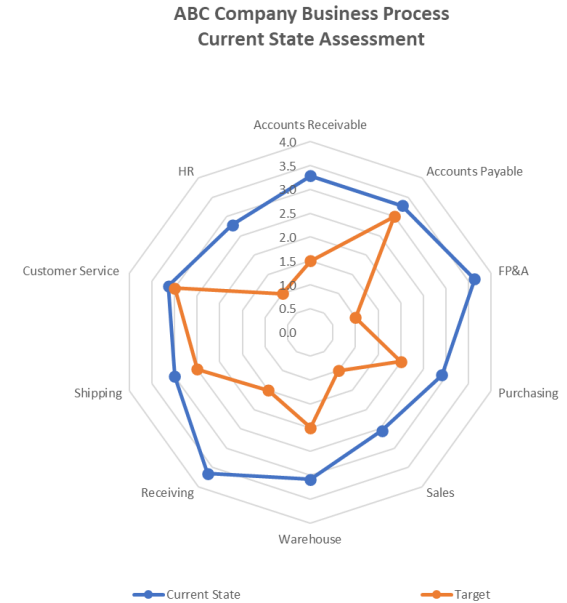
Transformation leaders should have:

- Strong track record of delivering digital transformations
- Demonstrated successful delivery of large-scale technology projects, such as ERP, CRM, HRMS, and WMS
- Change management
- Portfolio, program and project management expertise
- Board-level communication
- Industry experience

SMBs are investing in CIOs and transformation executives to guide them through a successful transformation

Get the Right People in the Right Seats

- Leverage tools to determine your organization's baseline for its people, processes, and technology
- For success, focus on:
 - Streamlining processes
 - Digitizing paperwork
 - Enabling employees
 - Enhancing customer experiences



Transformation executives will have templates, tools, and frameworks to streamline the digital transformation journey.

Thank you for attending



Eric Sluss | Net at Work

Fractional CIO & Advisory

Phone: 216.577.8251 esluss@netatwork.com

<https://www.linkedin.com/in/eric-sluss-pmp/>



Contact Eric at esluss@netatwork.com to receive a free digital transformation consultation.

Free Net at Work Resources

Digital Transformation **Consultation**

IT Health Assessment Survey

Organizational **Strategic Position** Assessment Survey

Business Health Assessment (BHA) Survey