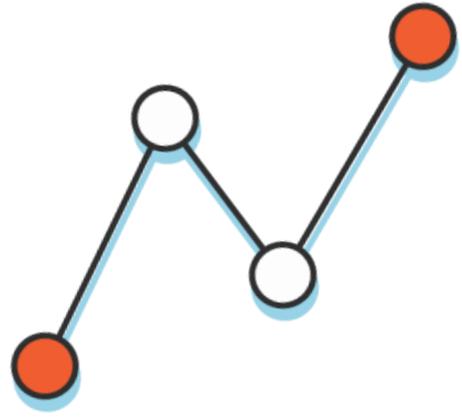


THE NO BS

DIGITAL TRANSFORMATION WORKBOOK



How to Master your Organization's
Business Systems
(Without the Headache)

PREPARED BY



info@bigbang360.com
www.bigbang360.com

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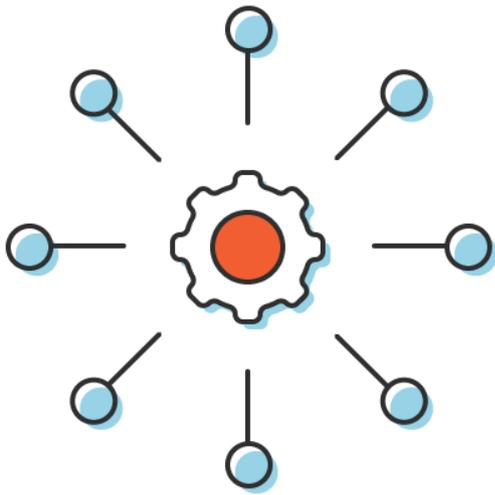
Map your priorities

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PRIORITIZATION AND REFLECTION

Chart your action plan against priorities





Congratulations! You've found a workbook that will help you become the champion of your organization's business systems. You are already that much closer to creating even more value for your business and equipped to drive digital transformation.

Perhaps this is your first stop, but on the other hand, you may have just wasted your annual IT budget to be told what you already know, or you may have received a slide show filled with trendy buzzwords yet no tangible action forward. The following few pages are here to give you the no-BS outline on how you can **innovate in a digital world**.

BENEFITS OF DIGITAL TRANSFORMATION

The goal of a digital transformation is to keep up with the changing market and competition.

- Lower costs
- Better security
- Enhanced ability to scale
- Increase collaboration
- Intelligent tracking of the customer journey



Digital Transformation

See page 7 for full definition.

Traditional management consulting firms get paid regardless of the outcome of their engagement. This limits shared incentives and does not hold consultants accountable for strategies that do not live up to your expectations.

This e-book all-encompassing approach that will allow you to **see concepts built into reality**. It will help you design, develop, and implement an architecture tailored to your business from start to finish.

SLIDESHOW VS. ACTION

Do management consultants really drive tangible value?

The focus is not on telling you the answer as much as it is about you **creating it**. The framework of this e-book is heavily based on providing tangible value through recommending a solution **that will work for you and your organization**. Whether that may be implementing a business system to support your growth, customizing software for your unique operations, or optimizing your processes for better collaboration, prepare to be guided towards **real results**.

IF WE KNOW ONE THING AT BIG BANG, IT'S THAT: DIGITAL TRANSFORMATION, WE GOT IT.

Time is precious, and we don't want you to be staring at the screen for too long.

Here's how to get the most out of this workbook:



Read this workbook from start to finish



Complete your current GAB'S Pyramid™ for your organization's situation today



Complete your Quick Enterprise Architecture Assessment



Fill in the Tables to Complete

DIGITAL TRANSFORMATION DEFINED

So this is like a crash course, but it doesn't mean we pass over the foundational concepts. Plus, there's a lot of them being tossed around out there, so it will help you navigate the ones that actually serve a purpose.

Now that you've decided to take this big step towards greater growth in digital transformation, you may quickly realize that

An understanding of acronyms madness and the annoying tendency to change terms and use buzzwords

there seem to be many buzzwords and unfamiliar terms used everywhere. They can be overwhelming to even the most sophisticated business operators. Does this situation sound familiar to you? You are not the only one.

There is no need to be intimidated by fancy buzzwords because whatever you call it by name, it's about results.

Knowledge dispels fear, and we'll help you detangle and understand what everything means, but, most of all, we'll also help you get the best out of your business by enabling you to grow through digital transformation.

SO WHAT'S WITH ALL THE ACRONYMS?

We've already told you that we would simplify everything for you, well here is the beginning of our journey together. Let's jump right into it. **Below, you will find a table with all of the essential industry lingo.** We suggest you keep this list at hand since you will most likely want to refer back to it often.



BUZZWORD/ ACRONYM	WHAT DO THEY ACTUALLY MEAN?
AI Artificial Intelligence	<i>AI mimics human intelligence so that it learns from past data and is continually optimizing its algorithms. The most common example is Google search.</i>
API Application Programming Interface	<i>API is a software intermediary that allows two applications to communicate with each other.</i>
Best-of-Breed (Architecture)	<i>The best system is used for each department's function. The main pro is that the best software for each situation is used, but the main con is that integration is required, and managing multiple systems can take more resources.</i>
BI Business Intelligence	<i>BI refers to the complex manipulation of data to extract and present business information. The end goal is to help executives make better business decisions.</i>
Big Bang	<i>An implementation strategy used to describe a go-live scenario where a business switches from their old software system (such as an ERP) to their new system at a single point in time.</i>

Big Data

Big data is the capability to manage a massive volume of disparate data at the right speed and within the correct time frame to allow real-time analysis and reaction using BI and AI tools. For example, an innovative business may want to analyze massive amounts of data in real-time to quickly assess the value of that customer and the potential to provide him with additional offers.

BPR

Business Process Review

A BPR refers to analyzing your current business processes to understand your current pain points and how the chosen platform can be tailored to alleviate these issues.

BSA

Business System Analysis

A BSA refers to the analysis of your current business processes to advise you on a platform that would best fit your needs and requirements, ideally considering your business plan.

Cloud

Cloud means that your data is safely stored on the internet rather than on your computer or hard drives.

Cloud ERP

Cloud-based solutions make ERP systems more affordable and easier to implement and manage. Companies of any size or industry can adopt cloud ERP systems.



Scan to read more about the benefits of cloud:



CRM

Customer Relationship Management

The CRM is where all activities related to leads, prospects, and customers are tracked.

Data staging

Data staging refers to an intermediate data storage area used to process data.

Data Warehouse (DW)

A DW is where a large amount of electronic data is stored securely. The DW can also be used for reporting and analysis.

Digital Transformation

The process of using digital technologies to create new — or modify existing — business processes and customer experiences to meet changing business and market requirements. This reimagining of business in the digital age is digital transformation. It may include replacing manual processes with automated processes, saving costs with everything on the cloud, putting the customer at the center of the operations/strategy, and forecasting order fulfillment with intelligent methods.

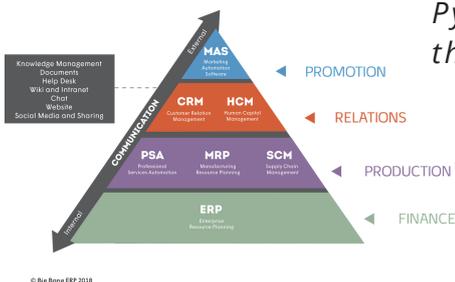
ERP

Enterprise Resource Planning

A process where a company manages and integrates all of the critical parts of its business into one system. Consequently making it easier to run. For example, an ERP management information system integrates planning, inventory, sales, marketing, HR, finance, and purchasing.

GAB'S Pyramid™

Created by Big Bang in 2018, the GAB'S Pyramid (Global Architecture of Business Systems) is designed to understand your current technology portfolio fully and thoughtfully plan for your future – ensuring proper integration. The Pyramid is a visual representation of the software and how they communicate.



Scan to learn more about [GAB'S Pyramid™](#):



HCM

Human Capital Management

Human Capital Management is a software application that streamlines human resource management activities, including talent management, workforce management, and payroll.

Help Desk

Help Desks are systems that help keep track of support cases and tickets. This can be a service offered to employees (internal tickets) or customers (customer support).

IaaS

Infrastructure as a Service

IaaS refers to renting computer hardware (servers, networking technology, and storage) instead of buying and installing it in your own data center. Companies are looking to defray costs and gain flexibility by leveraging infrastructure that can be used on-demand.

IoT**Internet of Things**

IoT refers to any physical object connected to the internet through a device that can create data. Simple examples are cars and home appliances with sensors through which you can view specific data through apps.

MAS**Marketing Automation Software**

Cloud marketing applications and solutions help you automate tasks like content publishing, engagement, lead nurturing, scoring, grading, social posting, and reporting, all contributing to building brand awareness, promoting your company, and strengthening its reputation.

MRP**Material Requirement Planning
OR
Materials Resource Planning**

When considering only the material portion of it, it is a software system meant to assist inventory management tasks by comparing current stock levels and upcoming supplies with current and forthcoming demands to ensure demands are met on time. As the name suggests, Material Resource Planning includes planning not only of materials but also of other resources such as labor and finances.

PaaS**Platform as a Service**

PaaS is an online service that provides software and application development tools and manages data storage and operating systems.

PSA**Professional Services Automation**

A PSA is a platform that helps service businesses manage their activities via projects and resource management.

SaaS**Software as a Service**

SaaS is an online service that delivers applications through web browsers. Most cloud business solutions can be referenced as a SaaS.

SCM**Supply Chain Management**

SCM software applications integrate end-to-end business processes across the entire supply chain into a centralized, user-friendly source. A SCM cloud solution will automate repetitive data entry tasks and improve accuracy, helping control costs and maximize profits. SCM supports warehouse management, inventory tracking, shipping, and logistics, improving communication and collaboration with all steps involved with its built-in tools.

**Siloed
(Architecture)**

Different departments run with additional software that is not integrated. The main pro is that each department has the best software for their work; however, with siloed systems, they cannot correctly collaborate well with other departments, so decision-making is challenging.

**Single-System
(Architecture)**

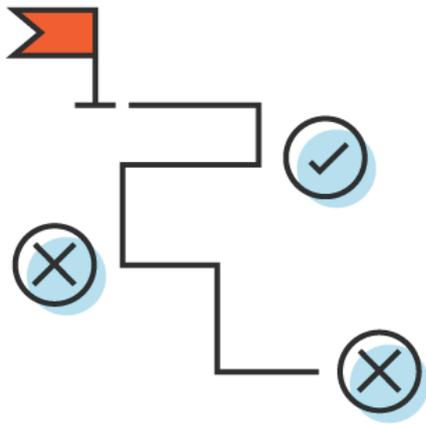
All processes in your business are managed with one single system. The main pro is that everyone has the same view, but the main cons are the lack of flexibility and limited product features.

**TTS
Text-to-speech**

TTS is a type of assistive technology that takes words from a digital device and converts them into audio. It is also known as "read aloud" technology.

**WMS
Warehouse
Management System**

A WMS is a software application that supports and optimizes warehouse functionality and distribution center management.



TRIGGERS FOR CHANGE

Signs and symptoms that your business systems are due for a change

Plain and simple, if you can check yes to any of the classic issues below, it may be time for you to start looking for new business solutions.

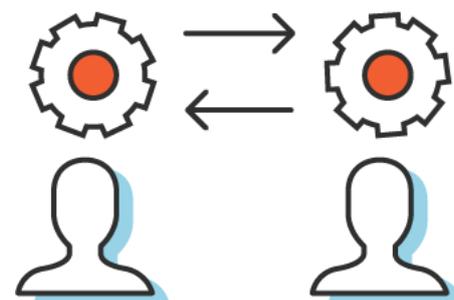
CLASSIC ISSUES

- ✓ **Manual and repetitive operations**
- ✓ **Inefficient business processes**
- ✓ **Segmentation of information**
- ✓ **Hard evolution of systems**
- ✓ **Growing pains of business expansion**

SOME EXAMPLES

- eCommerce integration
- Timesheets and payroll management
- Excel spreadsheets and closing a financial period
- Inventory management and logistics outsourcing
- Resource allocation

UNDERSTANDING BUSINESS SYSTEMS AND THEIR ARCHITECTURE



Single system, silos, one size fits all, best-of-breed?

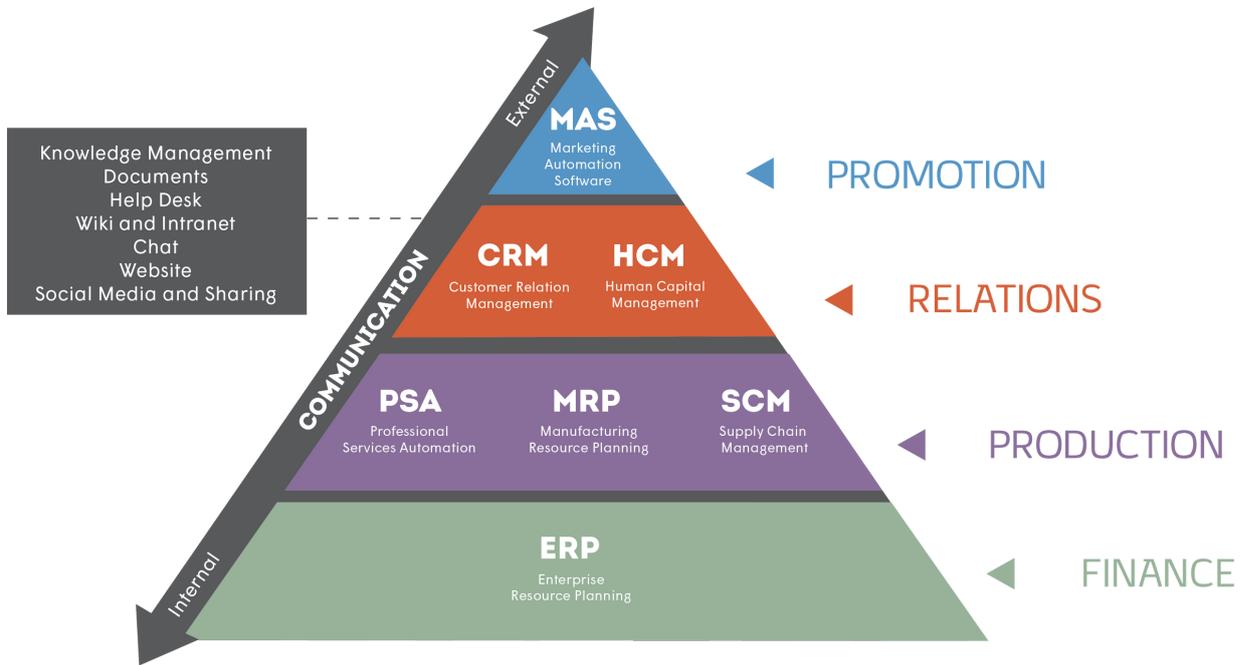
So we know we just laid down all these terms and are now using them, but here's the real deal: Digital transformation can mean many things to different people and organizations, but all share the same challenges, struggles, and limitations. The Pyramid, GAB'S Pyramid™, or the Global Architecture of Business Systems (if you want to sound fancy) is simply a visual representation of different functions in your business that can be supported by an ERP or by specialized software. It was designed by the team at Big Bang to understand, plan, map, and unite your organization's technology and systems.

Use GAB'S Pyramid™ to map the current and future state of system architecture - company-wide. It comprehensively reviews and presents how Information Systems should be implemented and work together in a company – any company, no matter the size.

It is a useful methodology to:

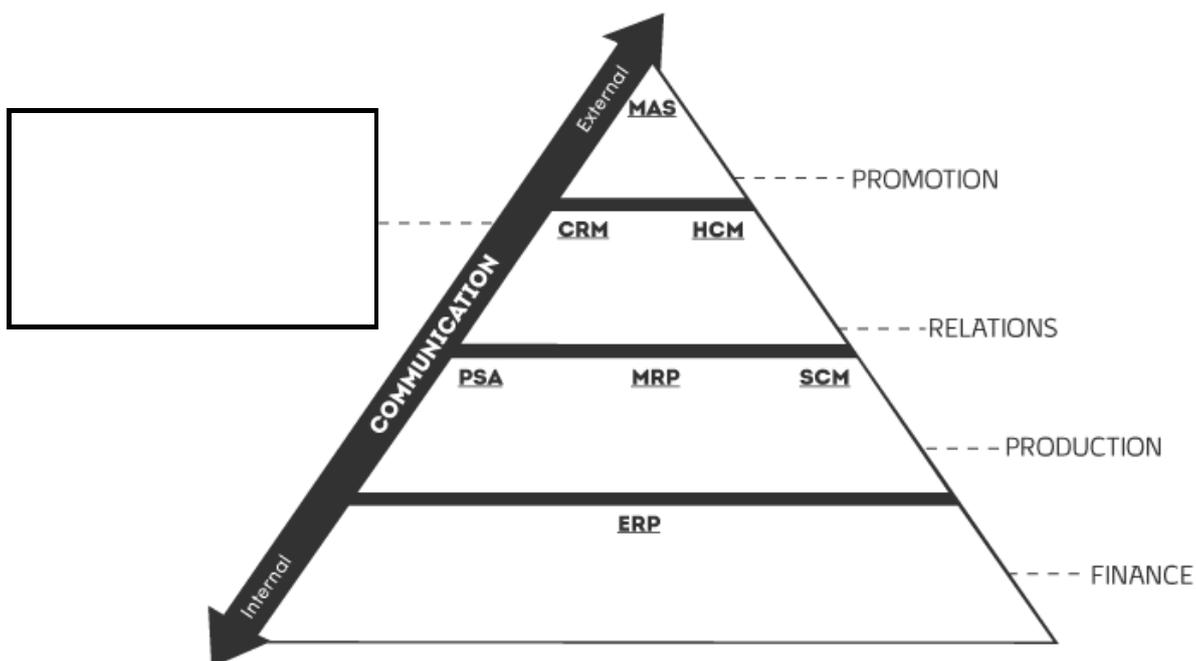
- ✓ Understand the state of your organization's business systems today and plan a roadmap for the future state, regardless of the order of adoption or the department leveraging the tools.
- ✓ Quickly map software decisions and their impact so your organization can make the right decisions at the right time and deploy systems in the correct order.
- ✓ Ensure technology conversations are efficient and part of a larger plan.
- ✓ Remain dynamic in an ever-evolving IT landscape with exploding and changing offers.

BOTTOM LINE: LEVERAGE GAB'S PYRAMID™ TO ENVISION WHICH SYSTEM(S) SUPPORT WHICH FUNCTIONS IN OUR ORGANIZATION.



Using this visual tool, you can easily understand if you have an architecture that is: single system, in silos, or best-or-breed.

But, at the end of the day, it doesn't matter which type of architecture you're using, as long as it works for you and helps your business sustain growth.



INFORMATION IS VALUABLE BUT OVERWHELMING?

Execute with confidence

Did you take 5 minutes to create your GAB'S Pyramid™?

Great! Now you know your System Architecture Landscape, and it is now time to think about how you will optimize it.

It's reasonable to think that your approach to deploying digital transformation will be as unique as your business itself. There are plenty of firms out there ready to guide you through this digital landscape, each with its own trademarked methodology. It's up to you to find a method that suits your organization's needs, goals, budget, business philosophy, and culture. However, in this thought process, be mindful of using an approach that is results-oriented, not slideshow-oriented. **The goal here is to go from strategy to execution.**

Where to start or catch up with BSA⁵™

The **BSA⁵™** is a tailored model for igniting and aligning digital transformation regardless of the system(s) or business function(s) you are looking to optimize. It helps equip your technology infrastructure enterprise-wide and reboot your growth with a clean slate.

When you work with the BSA⁵™, you can outsmart and react faster than your competition. By creating a proper strategic roadmap, you adopt leading technologies, proactively solve business problems, and achieve organizational alignment. Investing early in your business saves you time, resources, and unpleasant surprises down the road, something we can all agree is worth it.

Use the BSA⁵™ to:

- ✓ Identify and prioritize digital transformation initiatives
- ✓ Select the right system(s) and or integration(s) to implement
- ✓ Determine a budget in terms of effort and cost required for each initiative
- ✓ Construct a realistic timeline for the next 3-5 years



Scan to learn more about BSA⁵™

BSA⁵ Advisory
Aligned
Agnostic
Accountable
Accelerated

BUSINESS SYSTEMS ADVISORY

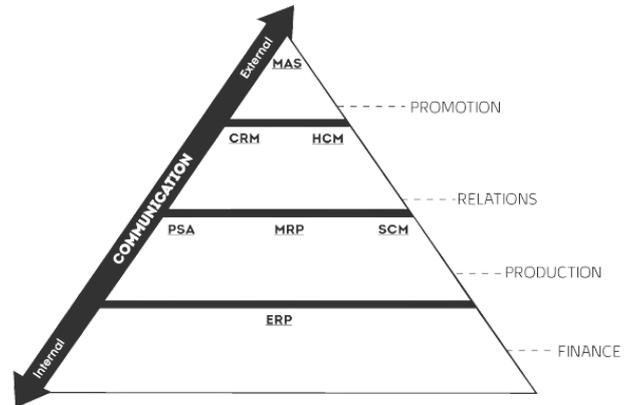
Deliverables

Marketplace Analysis

Current State

Your Global Architecture of Business Systems (GAB'S Pyramid™)

Pain Points



ang ERP 2018

Business Analysis

Business Requirements List

Critical requirements

Evaluation Matrix

Evaluate features from different solutions

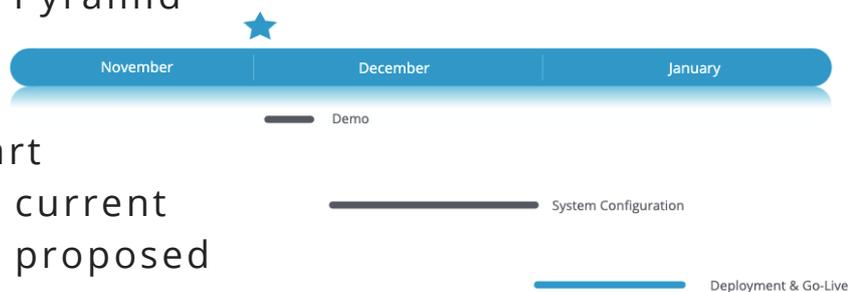
	Monday.com	Smartsheet	Clarizen	Mavenlink	NetSuite
	✓	✓	✓	✓	✓
	✓(with limits)	✓(with limits)	✓	✓	✓
	✓(with limits)	✓(with limits)	✓	✓	✓
	✗	✗	✓	✓	✓
	✓	✓(with limits)	✓	✓	✓
	✗	✗	✓	✓	✓
	✓(with limits)	✓(with limits)	✓	✓	✓
	✗	✗	✓	✓	✓
	✗	✗	✗	✗	✓
	✗	✗	✗	✗	✓
	✓	✗	✓	✓(with limits)	✓(with limits)
	✗	✗	✓(with limits)	✓	✓

Final Recommendation

Future State GAB'S Pyramid™

Flow Charts

- Integration flow chart
- Process flow chart - current
- Process flow chart - proposed



Strategic Roadmap Budgets, timelines

Stabilization & Post Go-Live Support

Not sure what you are really looking for?

There's no need to do it alone. Big Bang is excited to offer a free assessment to uncover what you are looking for, what you should be shopping for, and what you actually need. The Quick Enterprise Architecture maps out what areas of your organizations' GAB'S Pyramid™ need to be looked into first. That way when it comes time to *establish priorities, make an action plan and deliver* - you can confidently invest your time and resources where they matter most.



Feeling old school? Print the next few pages, grab a pen and start assessing.

YOUR QUICK ENTERPRISE ARCHITECTURE ASSESSMENT

Mapping your priorities

Free assessments by Big Bang
(bigbang360.com)

Scan to start:



INSTRUCTIONS

1. There are 8 sections; each section has three questions.
2. Select the response closest to your reality.
3. For software types that are non-applicable (N/A), simply skip the section. Typically, there should only be a couple of N/A software types.

Please complete the assessment (on the following page 16), then read the rest of the instructions.

4. Score each question:
 - Strongly Disagree: -2
 - Disagree: -1
 - Neutral: 0
 - Agree: 1
 - Strongly Agree: 2
5. Tally the score per section.
6. Map your scores on the blank pyramid.
7. Areas with low scores need attention, and areas with higher scores can be looked at later on. If it is helpful, you can color in the sections:
 - Lowest two scores: **Red**
 - Highest two scores: **Green**
 - Middle scores: **Yellow**
 - N/A: **Grey**
8. Note the sections that need attention in the **Priority Table** in this workbook.



LET'S BEGIN.

In **5 minutes** you will be able to identify what type of software needs your attention right away, which systems serve your organization, and everything in between—designed to simplify a complex decision-making process to know where to invest next.

GRADING SCALE	
	Neutral
	Strongly disagree
	Agree
	Disagree
	Strongly agree

Financial - **ERP** - Enterprise Resource Planning

1 - Your finance process is strong and stable

The way you manage your finances today will work exactly the same for the next two to three years and you are comfortable with the level of information gained and time required.



2 - Your financial planning is accurate

You are easily able to report and forecast your gross margin/profit and you can track receivables and payables in real-time.



3 - Your financial systems are well integrated

Your finances, receivables, and expenses are monitored together in one system.



Production - MRP - Manufacturing Resource Planning

1 - Your manufacturing process is strong and stable

Your stock is available when you need it and the cost of your stock is consistent and competitive. You do not have unplanned shortages of materials and you do not overpay for lengthy storage times.



2 - Your manufacturing planning is accurate

You have great visibility of the stock movements and from your forecasted demand the planning of the inventory accurate.



3 - Your manufacturing systems are well integrated

You are able to plan your orders and fabrication in real-time without manual assistance or external tools including spreadsheets.



Production - SCM - Supply Chain Management

1 - Your supply chain process is strong and stable

There are no challenges tracking inventory movements and inventory shrinkage is under control.



2 - Your supply chain planning is accurate

You have access to accurate inventory levels and are not surprised by missing items.



3 - Your supply chains are well integrated

You purchase/manage your inventory based on forecasted demand rather than gut feeling and your warehouse setup is efficiently maximizing space, with popular items accessed easily.



Production - PSA - Professional Services Automation

1 - Your production process is strong and stable

For the service provided by your organization, you are able to properly forecast, invoice, and collect easily.



2 - Your production planning is accurate

You are confident about knowing the accurate gross margin for your top 5 customers. Meaning you also know who your top customers are.



3 - Your production systems are well integrated

You are able to automatically generate invoices for all of your projects due for invoicing without manual assistance or external tools including Microsoft Excel.



You're almost there.

One page away from uncovering where to start with *critical improvements*.



Relations - CRM - Customer Relationship Management

1 - Your customer process is strong and stable

You confidently know how much effort (including touchpoints) is required to close a lead and you can instantly report your team's closing ratio.



2 - Your customer planning is accurate

You can clearly identify which stage of the customer journey a company or person is in. Additionally, no prospect or client is sent the wrong promotion or information by both the sales and marketing teams. Communications are consistent from all parties within your organization.



3 - Your customer management systems are well integrated

The finance department knows with close certainty the number of sales the company has in the next month.



Relations - HCM - Human Capital Management

1 - Your human capital/HR process is strong and stable

Your employee files are managed through a system and you can easily manage and calculate vacation days/time off, training and performance.



2 - Your human capital/HR planning is accurate

You are able to provide the right level of access to employee information to departments and leaders within your organization. When it comes time to review the performance of an employee, the information is stored in the same place as the employee's other information including career progression, coaching logs, legal documents, and any warnings.



3 - Your human capital/HR systems are well integrated

Employee vacation days are easily tracked and reflect the reality of days taken and the bank available per employee based on their contract.



Promotion - MAS - Marketing Automation Software

1 - Your marketing process is strong and stable

When a new lead is created you can easily tell the source and the cost to acquire the lead.



2 - Your marketing planning is accurate

You are able to calculate the performance of different marketing campaigns in one system, including the efficiency of emails, social media, online ads, events, traditional media.



3 - Your marketing systems are well integrated

You can track and calculate the ROI on any campaign and both the finance and marketing teams agree.



Communication

1 - Your communication process is strong and stable

You are never slowed down in day-to-day processes due to missing information and communication is easy to manage.



2 - Your communication planning is accurate

The majority of your time is spent creating value for your organization. You are NOT bogged down by countless emails, repetitive meetings, and an overload of instant messages.



3 - Your communication systems are well integrated

Information is centralized and easy to access - rather than coming in pieces from too many sources.



YOU'RE DONE!

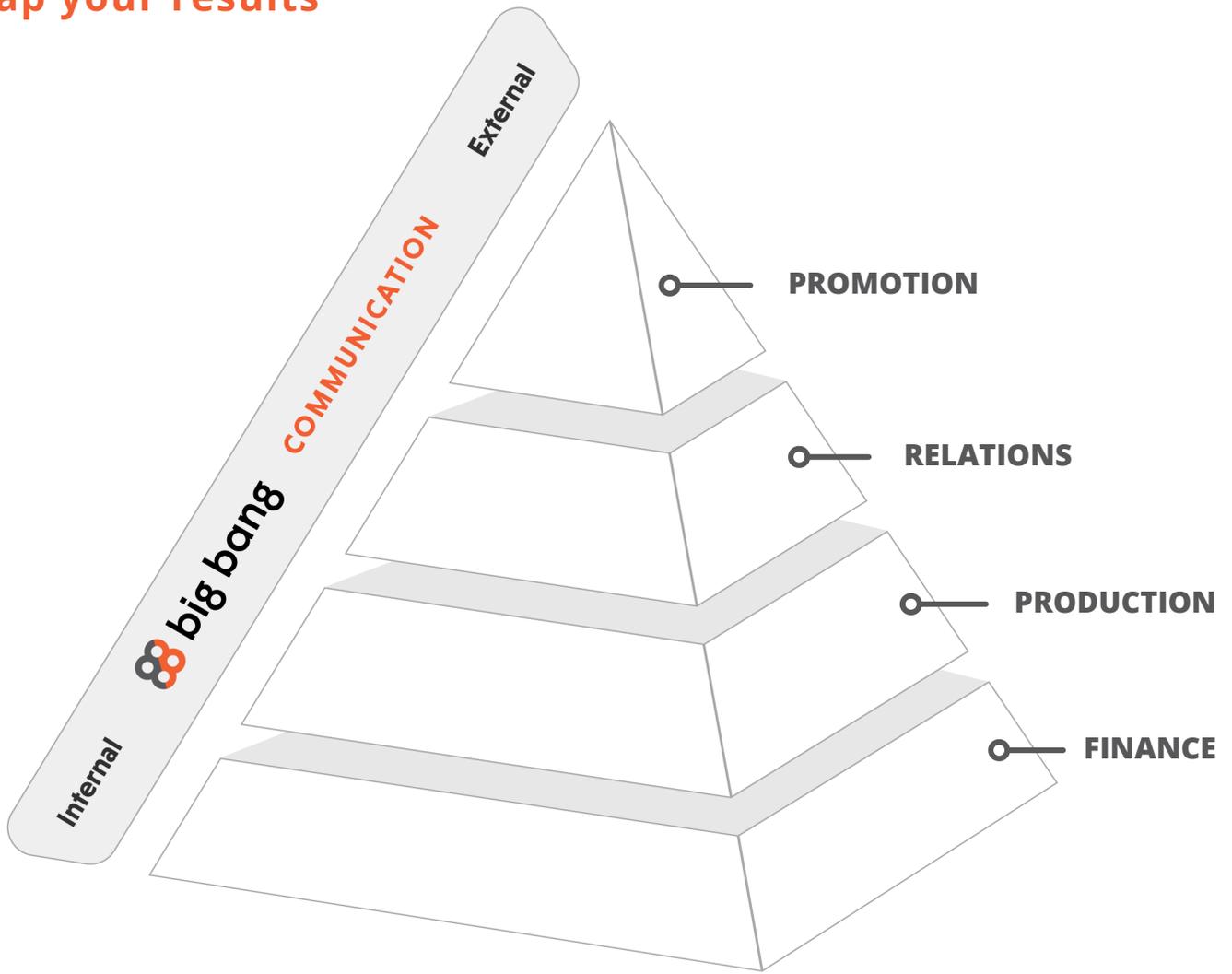
On the next page:

Tally the score per section using the grid.

Map your score on the blank pyramid.

Remember: Areas with low scores need attention and areas with higher scores can be looked at in the future.

Map your results



FINALLY, THE SECTIONS THAT NEED ATTENTION IN THE PRIORITY TABLE THAT FOLLOWS.

SCORING

SECTION	SCORE
Financial - ERP	
Production - MRP	
Production - SCM	
Production - PSA	
Relations - CRM	
Relations - HCM	
Promotion - MAS	
Communication	

NOTES

PRIORITIZATION AND REFLECTION

Table to complete

Note down your priorities and lead the Digital Transformation conversation.

Once you do, you will be ready to sit with technical and functional professionals who can help fill the gaps and create a plan to answer your needs. Are you ready to get started and create real value for your organization?



PRIORITY TABLE EXAMPLE

INITIATIVE/ ISSUE	CLOUD SYSTEM TYPE	CREATED VALUE	PRIORITY	BUDGET	TIMELINE
Customer Service	Help Desk	Increased customer satisfaction	High	\$15,000	1 month
Customer Visibility	CRM	Tailored marketing campaigns with greater ROI	Medium	\$35,000	2 months
Synchronization between CRM and ERP	Integration	Reduce tedious manual data entry and associated errors	Low	\$25,000	1 month



**FILL IN THE BLANK TABLE ON THE NEXT PAGE
FOR YOUR ORGANIZATION**



1.866.830.9225
info@bigbang360.com
www.bigbang360.com

ABOUT BIG BANG

Big Bang is a consulting firm that helps organizations optimize and streamline processes through planning digital strategy, deploying business solutions, and creating organizational alignment. Our purpose is to create tangible value for our customers by streamlining business systems, connecting information between systems, aligning strategy with technology, and providing support to develop organizational expertise. Our vision is for all people in every organization to have direct access to the information that enables them to do their best work anywhere and every day. With headquarters in Montreal, Canada, and offices in France, Mauritius, Toronto, and the United States, we aim to serve enterprises of all sizes and industries worldwide.