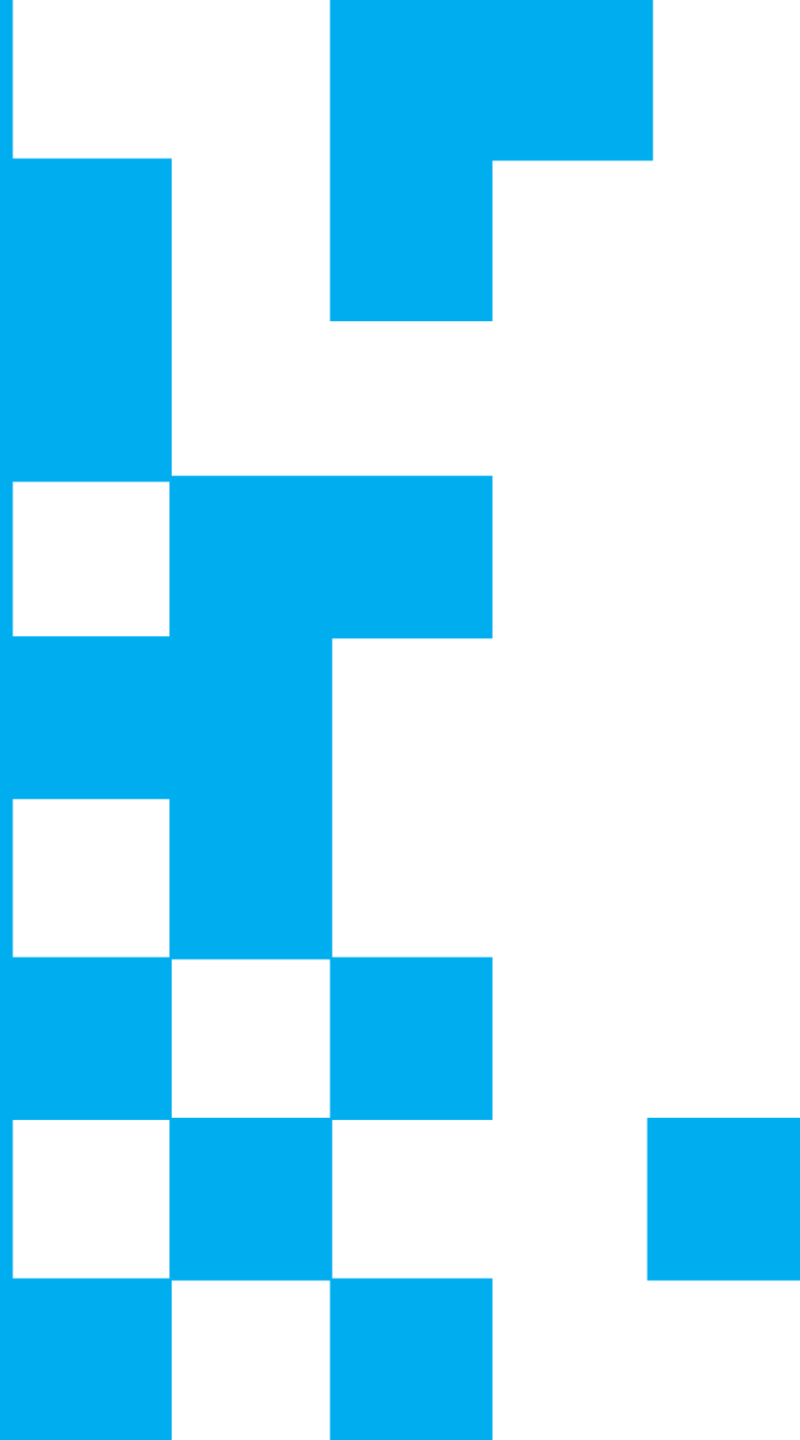




# Business Value Assessment\_

## Workshop Readiness\_



# Contents\_

## **Engagement Overview\_**

What is a Business Value Assessment and how does it work.

## **Kick Off\_**

What does the kick off and planning stage look like.

## **Strategy Sessions\_**

An overview of the strategic workshops.

## **Departmental Workshops\_**

An overview of the department specific workshops.

## **Playback\_**

What does the playback look like and what do you get.

## **Next Steps\_**

What happens after the playback.



# What is a Business Value Assessment?

**Infinity Group's Business Value Assessment will provide you with a complete assessment of your business in preparation for the execution of a digital transformation programme.**

Our Business Value Assessment workshop is designed to help you assess your organisation to understand challenges and opportunities, where change is required to improve efficiency and reduce costs and risk, and identify top initiatives for you to focus on, led by factual return on investment calculations. By working through a defined workshop agenda, we will help you to understand your current position and where you can improve.

Looking at key information such your organisational make-up, competitive landscape and current systems and processes, the Business Value Assessment is designed to help you build a business case for digital transformation within your business. The output from the workshops will include all the information you'll need to launch a digital transformation project, including proposed investment levels and accurate return on investment (ROI) calculations.

Your input in the process is critical, we need access to information and people in a timely manner to successfully complete the exercise and ensure you get the most value from it.

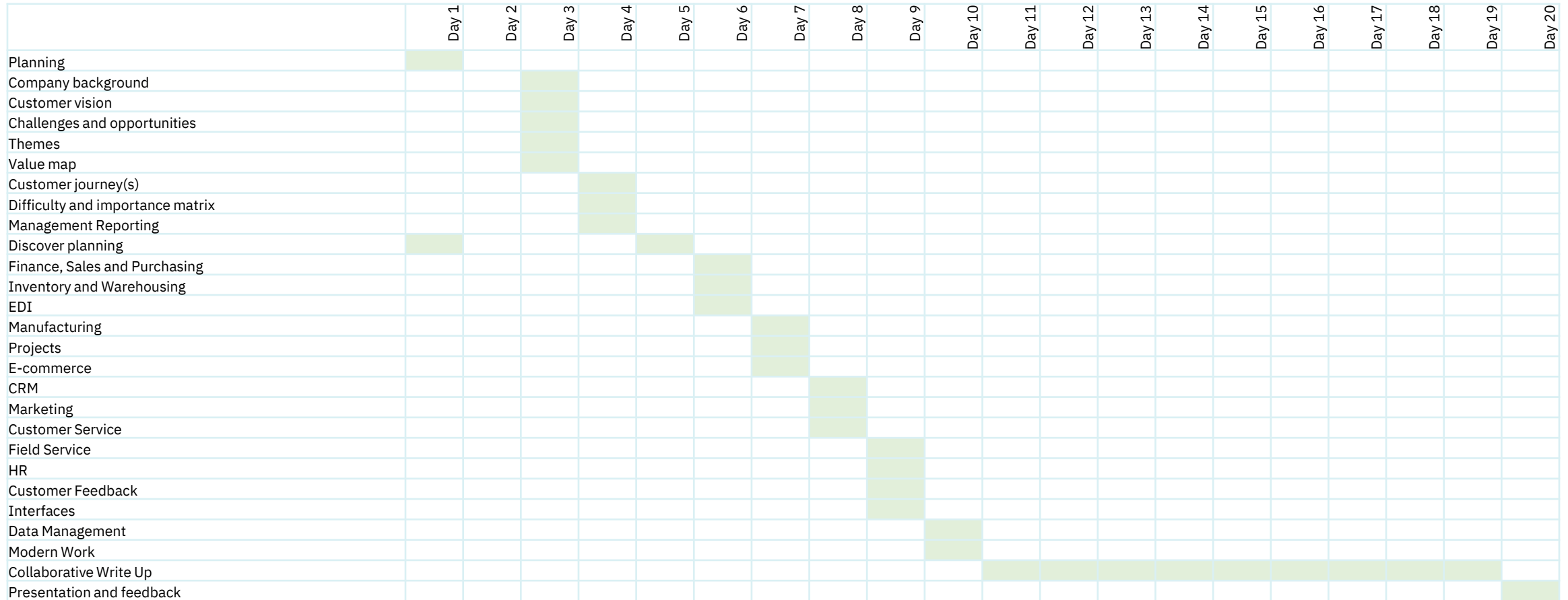
This document explains what each workshop involves, who should be there, and what you'll need to prepare, please share this document with everyone involved in the process so they can be ready.

**Throughout the workshops we will be endeavouring to capture as much quantifiable information as possible, which we combine with industry benchmark data to form the resulting Business Value Assessment. So wherever possible please provide data or evidence relating to key topics, your consultant will help guide you in this process.**



# Typical Timeline

The following graphic outlines the typical timeline for a Business Value Assessment but no two are the same, timings will depend on when your staff are available and how long for, we'll always be flexible when building a plan with you that works for everyone.



# Kick Off\_

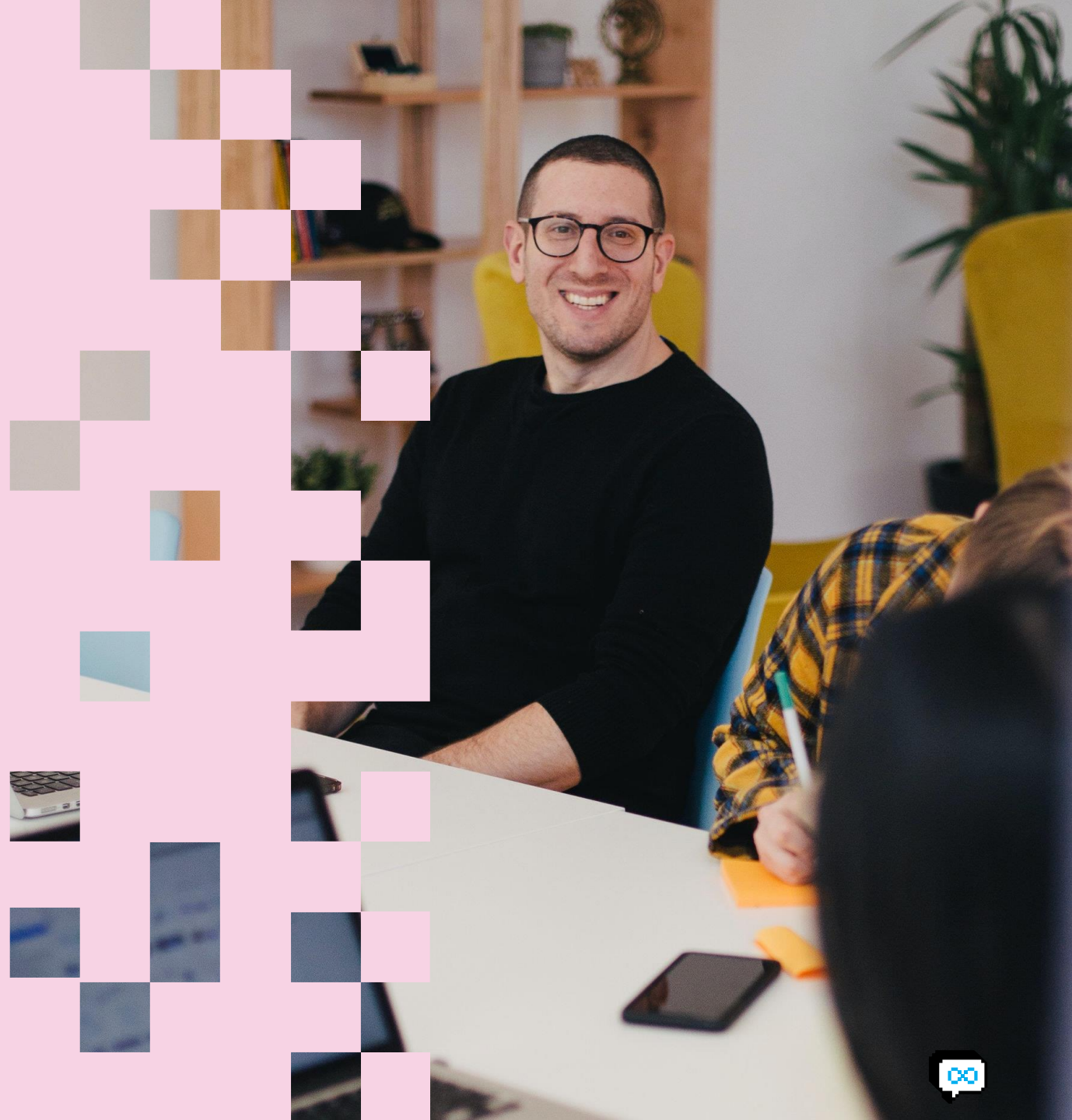
## Getting the planning done.

Prior to the commencement of the workshops a project manager from Infinity Group will be in touch to help arrange the workshops and any prerequisites.

A shared Microsoft Teams space will be created for everyone to upload and share data and documentation.

Your project manager will work with you to arrange the workshops ensuring the right people are in attendance at each one.

Our preference is always to run workshops face to face, particularly the strategic engagements, but these can be facilitated via Microsoft Teams if required.



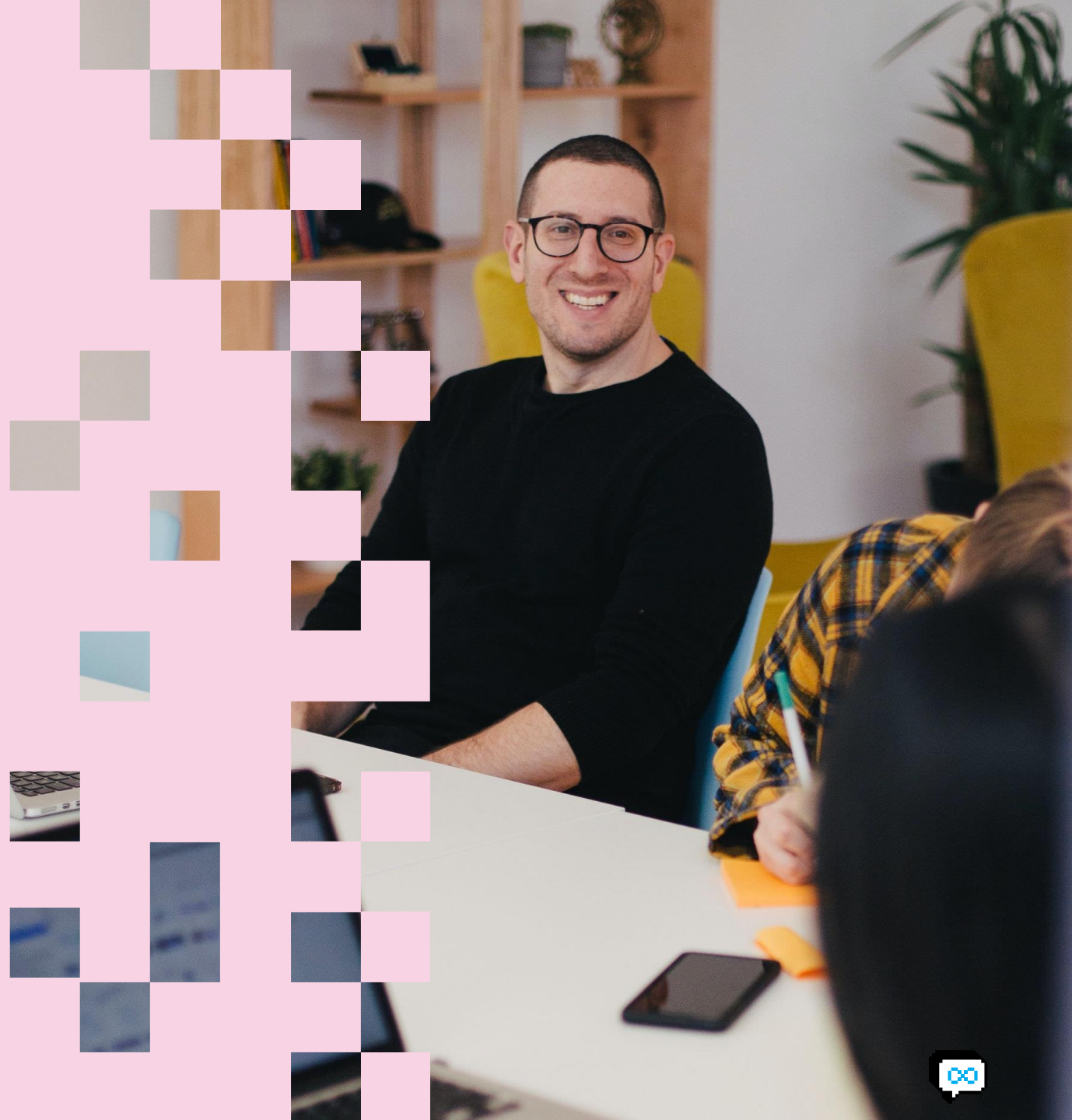


# Kick Off\_

## Getting the planning done.

We have developed a schedule for the workshops with fixed timings, but strategic engagements like this don't necessarily fit to fixed timescales. If we need more time to go deeper on a particular topic we will ask for it, and if necessary arrange a follow up session, its critical to go into the detail for the business case to be accurate.

Equally, some customers aren't big talkers and we finish a bit early, that's ok too, but we won't stop asking questions until we have the level of detail we need.



# Strategy Sessions\_

This section will cover the strategic workshops:

- Company background
- Customer vision
- Challenges and opportunities
- Themes
- Value map
- Customer journey(s)
- Difficulty and importance matrix



# Company Background\_

**Time:** 30 minutes

**Customer Attendees:** C-Suite, board members, owner, managing director, finance director, project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To understand the history of the organisation and how it has got to where it is today, covering relevant events such as merges and acquisitions, organic growth, etc. It's also useful to discuss why we are in the room, what was the trigger for engaging Infinity Group and what do you want to get out of the process.

**Prerequisites:** The more information we can have beforehand the better, things like an organizational chart, previous years' accounts and any historic company reports are all useful.





# Customer Vision\_

**Time:** 1 hour

**Customer Attendees:** C-Suite, board members, owner, managing director, finance director, project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To understand the future vision for the business, over a 3-to-5-year horizon, and answer questions such as: Is there a clearly defined strategy? Does the strategy consider technology? Is there M&A activity in play? Do you plan to use technology to differentiate yourselves?

**Prerequisites:** If you have a strategy or business plan documented already, this is really useful to have ahead of time.

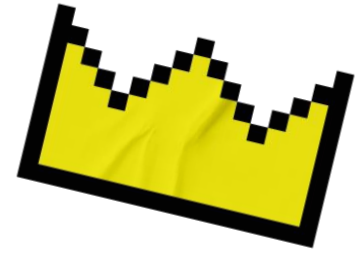
**Note:** This workshop may cover sensitive information regarding the future of the business and its people, so please bear this in mind when selecting attendees.

**Example output content on the next page...**



# Data Driven, Purpose Led\_

## Customer Statement\_



### Contoso

**We will use our data to better understand our prospects and customers.**

“Maximise the value of our xxx, creating sustainable business operations for everyone to enjoy. Connect a combined total of 1 million xxx with xxx and a more sustainable xxx.”

EXAMPLE



# Challenges and Opportunities\_

**Time:** 1 hour

**Customer Attendees:** C-Suite, board members, owner, managing director, finance director, project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To understand what challenges the business faces at a strategic level, things such as economic, political or environmental threats. And to also understand what opportunities are available, which considers topics such as M&A, diversification of products and/or services, economic, political or environmental drivers for opportunity. This sessions doesn't aim to uncover BAU challenges and opportunities as they will be covered in subsequent workshops, so your consultant will keep this focused on strategy.

**Note:** This workshop may cover sensitive information regarding the future of the business and its people, so please bear this in mind when selecting attendees.

**Example output content on the next page...**



# The Challenges and Opportunities

During our workshop, participants worked together in teams to answer these questions.

How might we make better informed business decisions based on accurate, real time, data?

How do we increase productivity?

How do we give staff the tools and training they need to succeed?

How can we improve the customer experience?

How might we create a reusable operating model prior to launching the next xxx?

How can we make our operations profitable?

How can we become more agile to take advantage of new opportunities?



# Themes

**Time:** 1 hour

**Customer Attendees:** C-Suite, board members, owner, managing director, finance director, project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To extract common themes from the preceding sessions which will inform the approach and lines of questioning when conducting departmental interviews. This is a chance for the executive team to shape the workshops that follow and ensure they delve into key areas of interest. Whilst the workshops are designed to give departmental stakeholders a voice, they also need to be strategic driven by the management team.

**Example output content on the next page...**





# Contoso has an Opportunity to Grow Revenue\_

## Top Line Growth

### Increase Sales

- **Better targeted** campaigns to **increase campaign conversion rate**
- Identify **cross-sell & upsell opportunities** more easily and **increase share of wallet**

### Improved Customer Loyalty

- Business processes optimised for **customer experience**
- Capturing **better** and **more timely** feedback to support **continuous improvement** and provide **staff KPIs**

### New Revenue Streams

- More **agile** and **efficient** systems would provide **faster time to value** for new initiatives such as xxx



# Value Map

**Time:** 2 hours

**Customer Attendees:** C-Suite, board members, owner, managing director, finance director, project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To work collaboratively to organize initiatives into four key value pillars: revenue growth, cost reduction, diversification of offering and risk mitigation. These will be further refined following the departmental interviews but this is a chance to get the views of the executive team on the matter.

**Note:** Time to get the sticky notes out!

**Example output content on the next page...**



# Business Value Map

**GOALS AND STRATEGIES**  
(CxO stakeholders)

**TACTICS AND ENABLERS**  
(Manager stakeholders)

**BENEFIT MEASURES**  
(Manager stakeholders)

**CAPABILITIES**  
(IT stakeholders)



Grow Revenue  
Value Proposition

Order size

Upsell

Customer lifetime value

Sales administration and tools



Reduce Costs  
Value Proposition



Transformation  
Value Proposition



Mitigate Risk  
Value Proposition

EXAMPLE

Value Pillars

# Customer Journeys

**Time:** 2 hours

**Customer Attendees:** C-Suite, board members, owner, managing director, finance director, subject matter expert(s), project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To document your customers' journey(s) when interacting with your organisation, focusing on opportunities for improvement and current pain points.

**Note:** Time to get the whiteboard out!

**Example output content on the next page...**





# Journey Map – Holiday Let



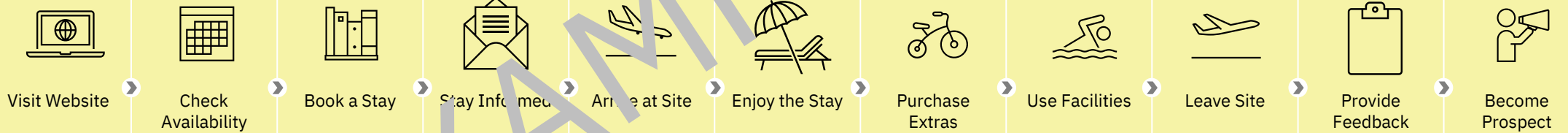
## Tracy the Traveler

This journey follows a holiday renter using xxx to rent a xxx. Owners can choose to rent through other agents, but few do. Contoso enjoy a higher than industry average number of repeat visitors, and renters can become xxx.

### STAGES



### STEPS



### PROBLEMS

- No 'account' for repeat bookers, so no access to previous bookings or prefilling of data when booking again

### OPPORTUNITIES

- Customer Data Platform for better targeting of communications





# Difficulty and Importance Matrix

**Time:** 2 hours

**Customer Attendees:** C-Suite, board members, owner, managing director, finance director, subject matter expert(s), project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To organize identified initiatives into an importance and difficulty matrix to aid in the identification of the highest impact, least effort, changes. This helps to drive the prioritized roadmap which forms part of the output.

**Note:** Time to get the stick notes back out!

**Example output content on the next page...**

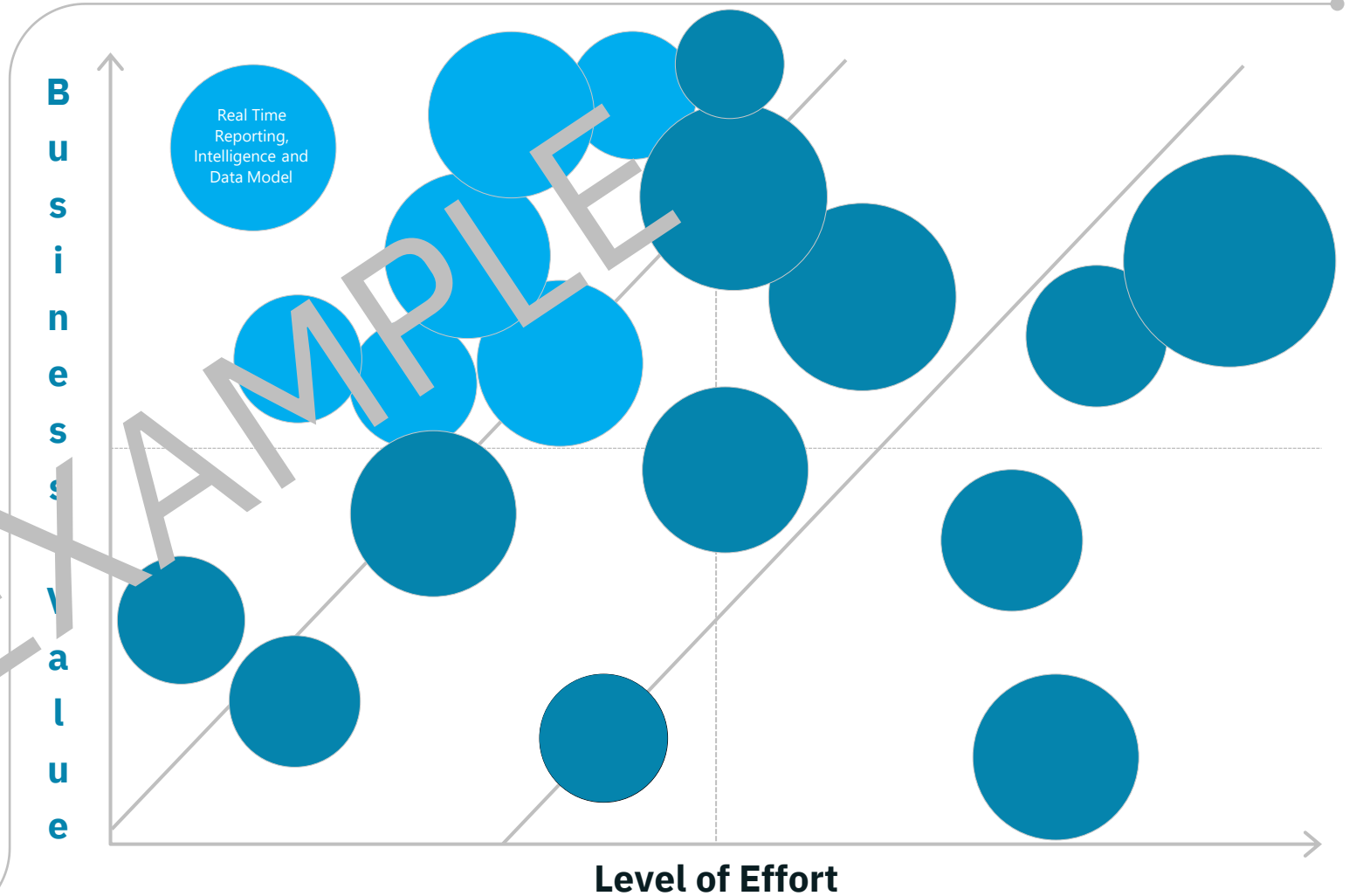


# Prioritisation\_

**OPERATIONAL  
GOAL(S)**

**IMPORTANCE/DIFFICULTY  
MATRIX**

**ACCELERATE  
SALES &  
SERVICE  
VELOCITY**



# Departmental Workshops\_

This section will cover the departmental workshops we will run, including how they work and what's covered.

As with the strategic workshops we much prefer doing these face to face as it gives us an opportunity to really understand your day to day lives, but we can facilitate them via Microsoft Teams if required.



# What to expect

**Time:** 0.5 to 4 hours

**Customer Attendees:** Subject matter experts, project manager

**Infinity Group Attendees:** Lead consultant, supporting consultant

**Aim:** To understand what a day in the life of each department looks like, where is time spent, and where is time wasted. What tools are being used and which processes work and don't work.

**Prerequisites:** It's helpful if each subject matter expert can give some thought to their 'average' day and write down the tasks involved and the timings, this makes the workshop more efficient, the output we are working to is on the next slide, so any thoughts ahead of time on challenges, opportunities, pains and goals are also helpful.

Copies of any SMT/SLT reports and your Board Pack are also very useful.

**Note:** It's important that your staff are briefed before these workshops and given the authority to be completely honest. There are no right or wrong answers, but the more real-world information we can collect, the more accurate the resulting business case will be. If there are things that don't work, we want to know about them, we are not here to judge, but rather to help understand the problem(s) and propose valid solutions that will deliver ROI.



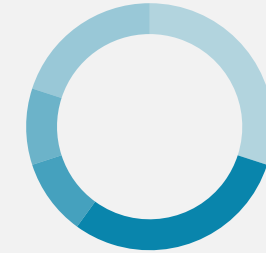


## Persona\_

Finance Felicity



## Typical Day\_



- Reporting
- Manual Entry
- Business Support
- Preparing and forecasting budgets
- Accounting

## About\_

Felicity ensures the smooth running of the business by controlling the income and expenditure. Besides the traditional roles of handling the payroll, income and expenses, financial responsibilities include economic analysis of the group.



*“Lots of our finance processes are manual and time consuming, and we have to provide non-finance data to the business because our systems can’t”*

## Goals / Motivation\_

- Ensuring time is saved on reporting
- Easier access to financial information



## Needs\_

- Automatic reporting



## ROLE / RESPONSIBILITIES

- Accounting
- Month end
- Reports for the business
- Invoice processing
- Processing Payroll
- General business support

## Pain Points\_

- Reporting – requires manual downloading and consolidation of information from xxx and yyy
- Manual entry – especially processing xxx purchase invoices each month
- Statement particularly time consuming due to manual error – takes xxx individuals yyy days



## Opportunities\_

- Outlook integration ensures data stored in xxx is up-to-date
- Sync between xxx, yyy and zzz will save time and provide consistency
- A more efficient way to manage intercompany transactions





# Departmental Workshop Summary

Title	Length	Description
Modern Work	2 hours	Understanding your current physical infrastructure, how and where staff are working and on what devices, and what productivity and collaboration tools you are, or are not, using. Also looking at technology such as your telephone system, mobile phones, Wi-Fi solution and more.
Finance, Sales and Purchasing	4 hours	Looking at your current core finance processes, how the team is structured, which tools you use and how long key processes are taking. Asking things like are you having to do lots of manual Excel work, are things like approvals automated, and other productivity-based questions.
Inventory and Warehousing	2 hours	Understanding how you manage inventory, how it flows through the business, and what your warehouse setup looks like. Understanding how automated the processes are and whether you are using technology like handheld devices. Also understanding whether any parts of the process are outsourced or not.
Manufacturing	4 hours	Reviewing the manufacturing process and the tools and technologies involved. How much of the process is in house, how does it fit in with inventory management and order fulfilment.
Projects	2 hours	Asking how you deliver projects, are they fixed price or time and material, do they involve providing goods or services or a mixture. How do you sell and contract projects and how do you effectively track and manage them through to billing.
E-commerce	1 hour	Working with you to understand how you transact online. What proportion of your sales does it account for and what technology are you using for your store and are there any supporting technologies such as shipping aggregators.
EDI	1 hour	What EDI requirements do you have, who are you exchanging information with, how often and why. Are there manual processes involved, and how long is it taking.
HR	1 hour	Looking at the full lifecycle of HR from hiring through to people management. What is your onboarding experience like and how much of it is digitized, likewise with day to day HR such as time off and absence management. Are you using a single system or multiple systems, are you tracking employee engagement and wellbeing.

**Note:** Only relevant workshops will be included in the plan, we won't spend 4 hours on manufacturing if you don't make stuff.



# Departmental Workshop Summary

Title	Length	Description
CRM	1 hour	Understanding how sales and relationship management works for you. What tools are you using, are adoption levels high or low and are you getting the information you need to make informed decisions such as accurate sales forecasting. Are users able to work from anywhere and do your sales managers feel confident in the tools you have.
Marketing	1 hour	What marketing tools are being used and how effective are they. Can you accurately segment your customers and prospects in an intelligent way. Is your marketing platform integrated with your website and sales tools or are you having to manually update separate systems.
Customer Service	1 hour	Looking at what customer service means for you and what tools you have in place to manage it. How can your customers interact with you and what is their experience like when they do. Are there any manual processes in place and do customer service staff have access to the data and systems they need to answer customer questions in a timely manner.
Field Service	2 hours	Working with you to understand how you manage your field resources, how automated is your booking and scheduling process and what tools are you using. How is the team structured, is scheduling done centrally. Do remote workers have mobile capabilities and how are you tracking their work.
Customer Feedback	30 minutes	How and when are you collecting customer feedback and are you using the data to drive actions and insights in other parts of the business. Is the process manual or automated, what questions are you asking and what tools are you using.
Interfaces	1 hour	Do you have any interfaces with other external systems, for customers, suppliers or partners. What data are you exchanging with them and is it automated or manual. How much time is spent exchanging data and are there any security risks or inefficiencies in the process.
Management Reporting	2 hours	What does your management reporting pack look like, do you have an SMT/SLT pack and a board report, do you have departmental reports. How much time is spent on reporting and how manual is the process of gathering data. Do you have to rely on the finance team to help every month.
Data Management	2 hours	Understanding where data is stored, how organized is it, how secure is it. Do people have access to the data they need when they need it. How ready is your data for AI tools

**Note:** Only relevant workshops will be included in the plan, we won't spend 4 hours on manufacturing if you don't make stuff.



# Write Up\_

## We'll go away and do *a lot* of work.

During the write up stage we are taking all of the information we've gathered from the workshops (up to 30 of them!) and digesting it and turning it into a business case for you.

As you can imagine, this takes multiple iterations and collaboration between us and you to get the output right, so please expect to be contacted during this time to help answer questions, validate assumptions and review recommendations.

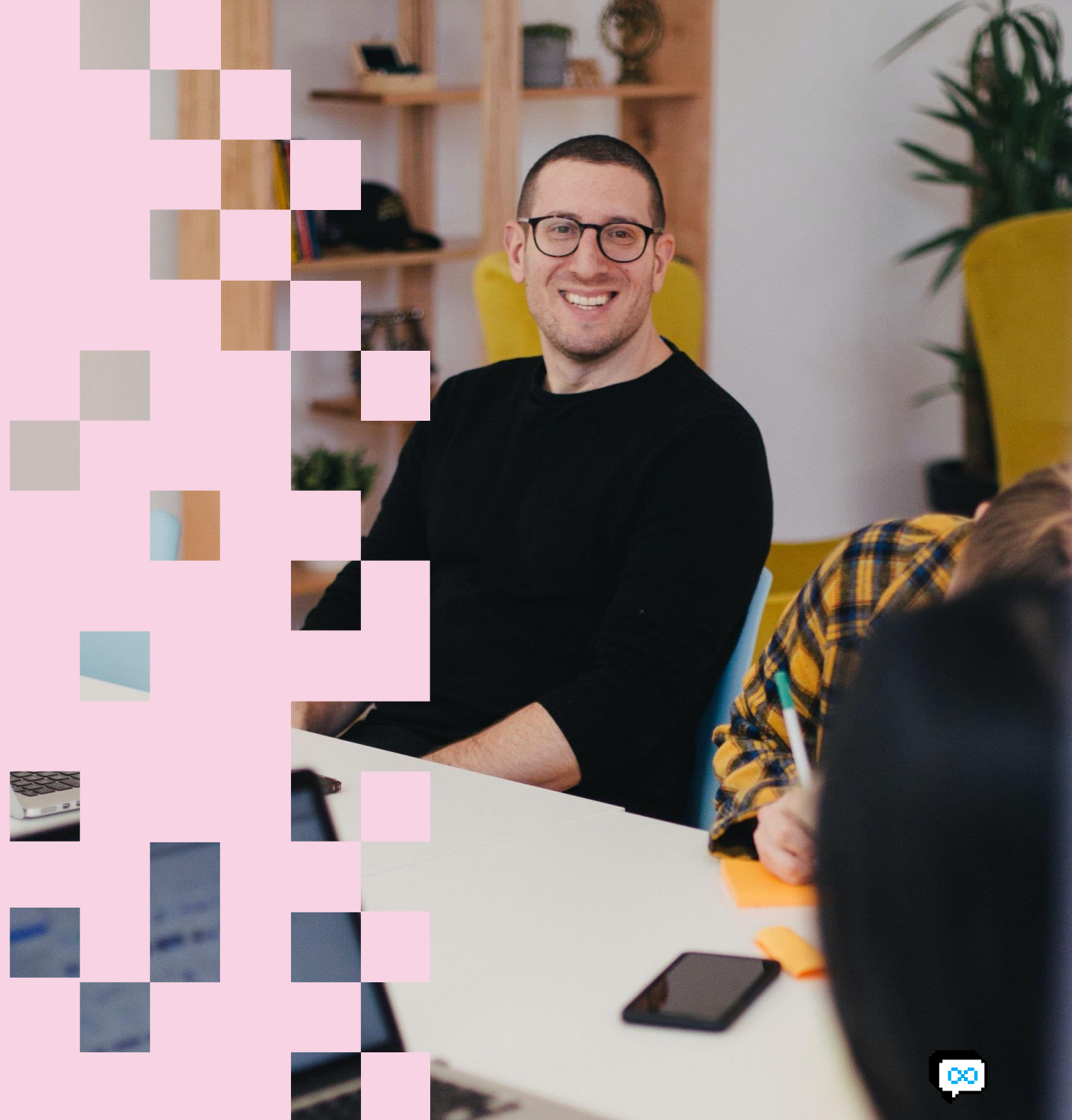




# Review\_

## Working together to get the output right.

The playback to the board has the most impact when it is validated and accepted by everyone involved prior to playback so we'll ask you to review a draft version of the report and executive summary and provide feedback before we issue final versions of the output assets. It also helps to get the buy in of the board of you help to present the executive summary so, if you're comfortable doing so, we'll assign some items from the playback for you to present.



# The Output and Playback\_



# What do you get?

After all of our collaborative hard work during the write up stage you will be issued with final versions of the documents we produce:

- Executive Summary
  - This slide deck contains a summary of all the information we gathered along with one (or more where relevant) business cases for digital transformation, outlining the ROI and cost benefit analysis summary, along with a proposed roadmap and next steps
- Supporting Data
  - We will also issue you with a spreadsheet which contains the supporting data for the business case, this lists each area where time and/or money can be saved, where new revenue can be found and the estimated cost to implement any of the initiatives
- Full Report
  - You will also be supplied with a detailed report outlining the full summaries of each workshop and what was discovered. This report will also outline the detail of the thinking behind the business case, as well as the details of any proposed projects, including how they are structured and what the estimated costs would be





# Next Steps\_

Part of the output provided to you will be a roadmap which outlines next steps and proposed projects to execute. This typically starts with the lower effort/higher impact initiatives identified during the difficulty/importance mapping exercise, but might start earlier than that with some tactical projects such as the implementation of a change management process to support what's to come.

We will work with you to drive the proposed program of changes forward.







We do *IT*  
differently\_

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