



The Viaticus V

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ROI Consul

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The ROI Consul Implementation Model

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Introduction: Viaticus

IT implementations have always been associated with high risk, often resulting in unexpected costs and late delivery.

To cut the time and risk involved in such scenarios, ROI Consul has developed our own Implementation Model. This is called Viaticus. A Latin adjective, defined as "Relating to a Journey".

Latin definition for: viaticus, viatica, viaticum

viaticus, viatica, viaticum

adjective

Definitions:

1. relating to a journey

Age: In use throughout the ages/unknown

Area: All or none

Geography: All or none

Frequency: 2 or 3 citations

Source: Charles Beard, "Cassell's Latin Dictionary", 1892 (CAS)

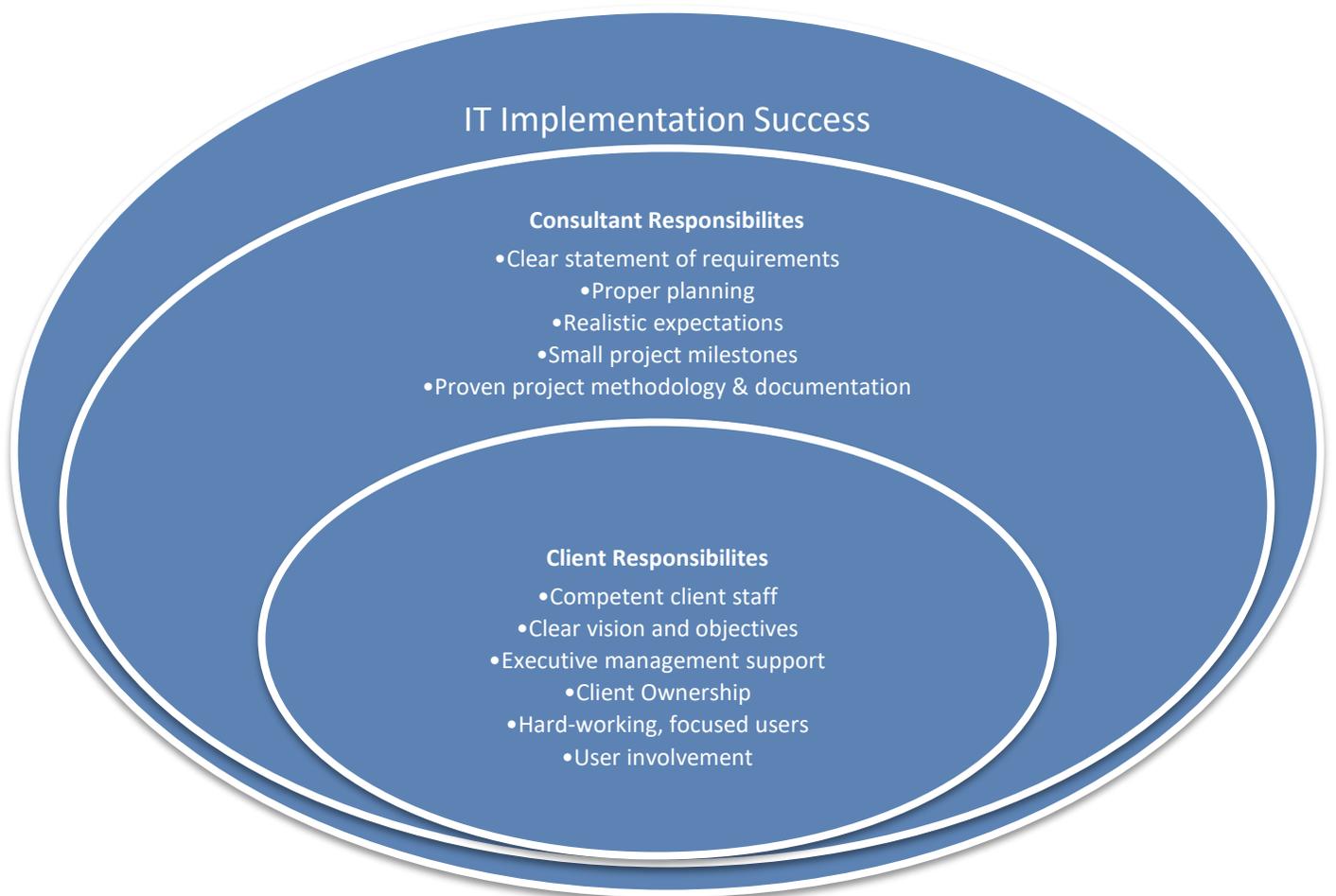
Viaticus enables us at ROI Consul to deliver efficient, effective and well-managed projects for every client, consistently. It also provides an auditable and visible path from creating a business case for an IT system to delivery and benefits review.

It helps us to define the return on investment achieved from the IT change and is the basis for establishing a cycle of continuous improvement, where KPI's are monitored to maintain a culture of high performance within the organization's IT systems.

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Critical Success Factors

In every IT Implementation there are a number of critical success factors, that must be met to enable successful delivery. Some of those needing to be supplied by the Consultant and some by the Client. This means that during the execution of any IT Project it is critical that we work together to form a synergy, to conclude in complete success.

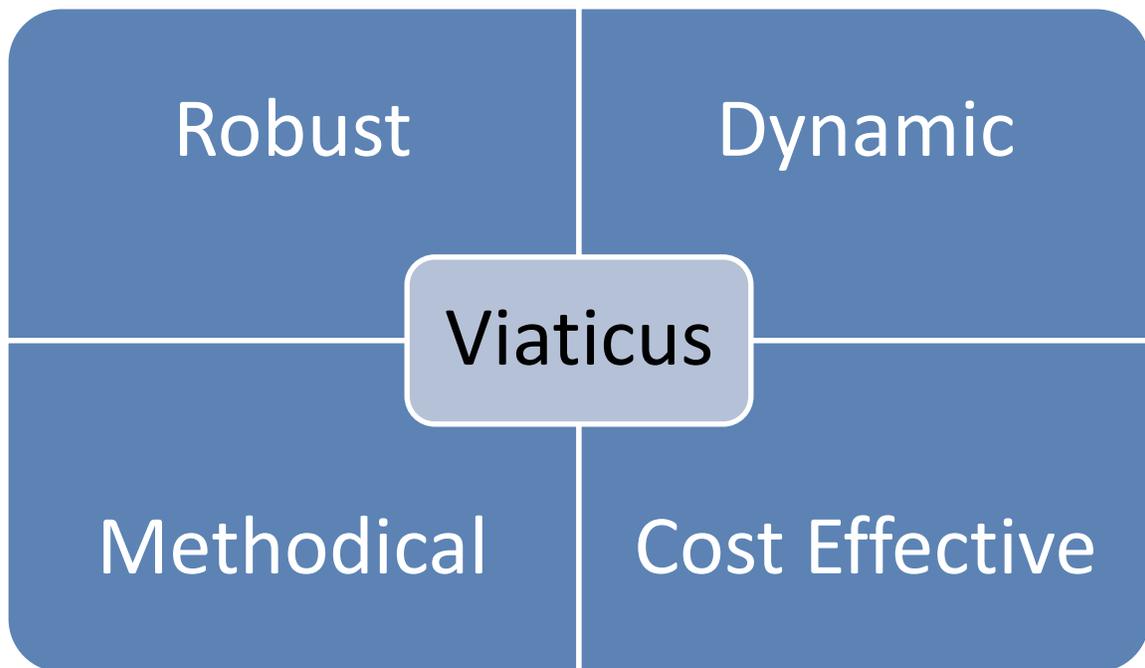


Our strategic objective is to deliver better business solutions faster to our clients through a reliable, high quality implementation model.

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The consistent application of Viaticus throughout our projects results in efficient, effective and well-managed solutions.

With Viaticus we are able to pass on the benefits of our experience and knowledge, to our customers throughout the journey of an IT implementation.

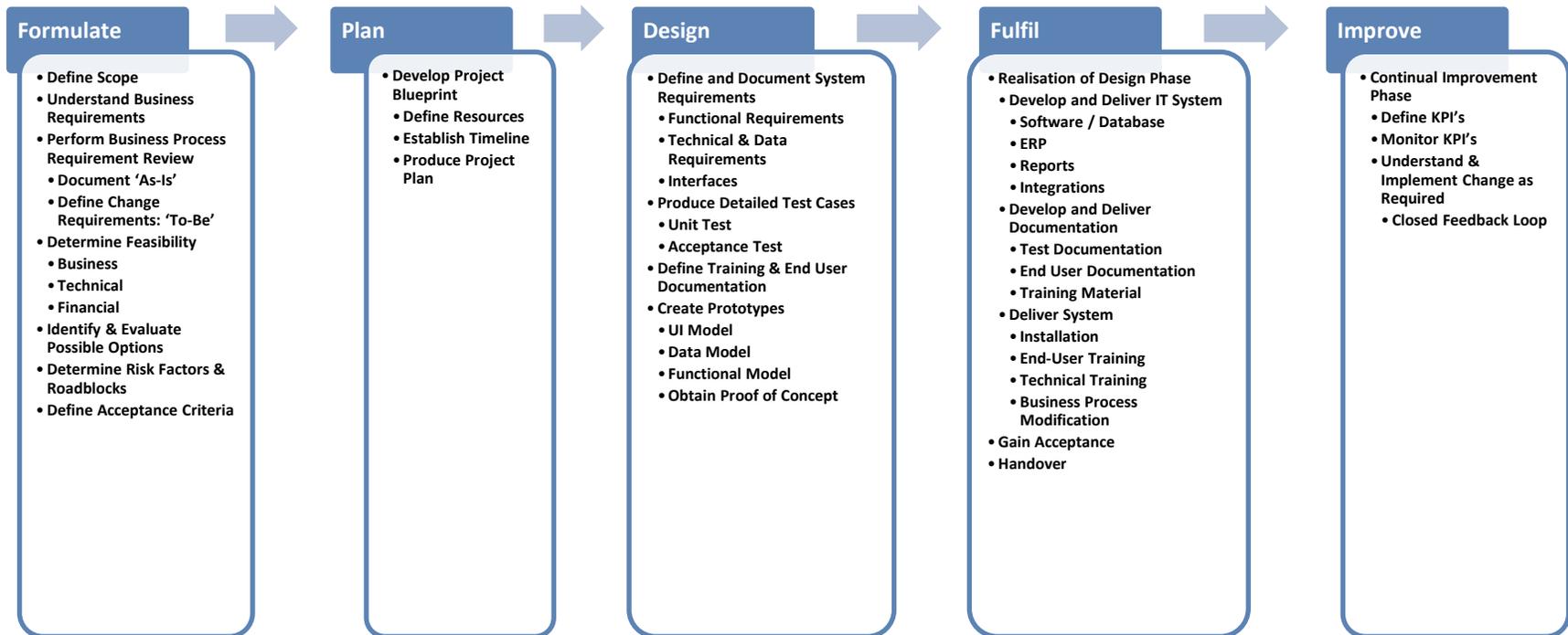
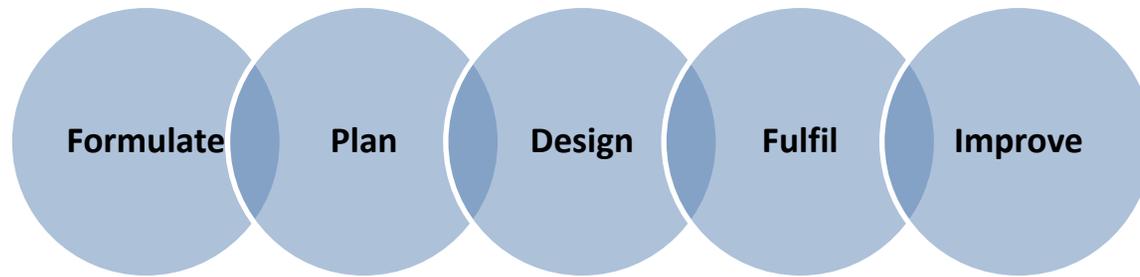


The Five Stages of Viaticus (The Viaticus V)

The ROI Consul Implementation Model is broken into five stages (The Viaticus V): Formulate, Plan, Design, Fulfil, and Improve. Each stage includes a series of segments that are filled with a set of inputs, tools, techniques, and deliverables all building upon one another to move onto the next stage.

The methodology also includes built-in sign-off processes to better ensure each party is satisfied throughout the project, before moving to the next group of milestones.

Each stage of the Viaticus V is outlined below.



The Viaticus V in More Detail

Formulate

During the initial phase, ROI Consul aligns the project expectations with the IT Solution that you are planning to implement. A key part of this stage is defining scope, business, technical and financial requirements and also to ensure that the solution you are considering is feasible and will meet your business needs.

Here ROI Consul and the customer work together in discovery mode to complete a Business Process Requirement Review (BPRR). The BPRR is an in-depth fact-finding covering functional, data, system, reporting and integration needs, as well as current and future business processes.

We will then explore the appropriate options, and assess all potential roadblocks to ensure that you will meet your timeline and budget requirements. Finally, we define the acceptance conditions of the IT Project ensuring unambiguous sign-off criteria.

All of this preparation allows you to know upfront exactly what to expect from both the functionality and implementation perspectives.

Plan

Upon completion of the Prepare stage we know "the journey" and have determined that it is feasible for the business. In the Plan step, we agree on "the road map".

This begins by setting SMART Objectives (Specific, Measurable, Agreed, Realistic and Time defined), using the output from above and then documenting them using Microsoft Project.

The roles and responsibilities of the various participants in the project are outlined during this phase and the acknowledged roadblocks are integrated, illustrating how identified risks will be reduced or avoided during the project. Contingency plans may have to be developed where necessary.

The production of the project plan deliverable, that meets the requirements and sets the pace of the entire project is a team effort with the client driving the initiative and approving the final result.

It is important to note, that effective project management procedures are essential for maintaining the direction and momentum of the implementation once the plan has been prepared and approved.

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Unexpected issues with the requirements or resources may arise, making corrective actions or changes to the plan necessary.

Regardless, it is at this point we move on to the next stage which analyses and documents all required Business Process & IT Systems in detail.

Design

The objective of the Design step of Viaticus is to build a model of the new system. If Formulate defines “the journey”, Plan defines “the road map”, then the Design step defines and documents explicitly “the vehicle”.

The Consultant and Client work together using techniques outlined in the ROI Consul Analysis Methodology (described in another document) to document the system. We explicitly outline how it will meet the business needs in a pertinent and understandable format. Outputs include designs, interface definitions, test documents, end user and training information.

In some cases, a prototype will be produced, that is tested and evaluated using sample transactions to ensure its accuracy, augmented by this set of business processes, work procedures, technical and functional instructions.

Regardless, this phase provides the customer team with the opportunity to confirm that the system meets the applicable specifications, and proof-of-concept verifies that functional and technical models in each area are valid and we are ready to proceed to Fulfil.

Fulfil

The Fulfil stage of the Viaticus V Implementation Methodology is where the IT System is implemented. The methods used vary on the IT System being delivered, including but not limited to:

- Custom Software and Database Solutions
- ERP Solutions
- Operational and Management Reporting
- System Integrations

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Either way, we have already defined the Functional and Technical Requirements, Project Timescales and Sign-Off Parameters so it is simply a matter of following the agreed documentation specific to the IT System being implemented.

Once the technology and associated collateral is implemented or developed and installed. End user and technical training can commence. This may take the form of one-to-one, group conference room scenarios or online classroom training. The objective is to ensure that the change is accepted, the new systems are understood and we obtain approval and sign-off in the form of Go-Live consent from the client.

Once live on the new system and it becomes a part of the client's daily activities the users will acclimate to the new procedures and processes. During this period of significant change, ROI Consul will continue to be available to provide support and the project will remain open until all associated business operations are normalized.

The Fulfil stage is not complete until ROI Consul works with you through your warranty period to help you confirm that all parts of your new IT system are operating as designed. Once the project is officially closed, support will be available for any ongoing questions or maintenance that you may need.

Improve

This is an optional stage in the ROI Consul IT System Implementation Methodology and a very important one in Business Intelligence and Reporting execution, that focusses on Continuous Improvement and a culture of high performance within an organizations IT Infrastructure.

It is an ongoing process where ROI Consul fosters an ongoing relationship with the customer encouraging a mindset focused on continually improving processes and profits through the effective use of IT Systems, Integrations and Reporting.

Each business owner defines a set of Key Performance Indicators that are continually monitored to ensure that the system is performing as it should be. The ultimate aim is to ensure the Return on Investment is understood with benefits reviewed and further action taken if they are not realized.

The following lifecycle is used within this stage to plan, execute and audit metrics.

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About ROI Consul

Mission Statement: To provide our customers with robust IT consultancy that gives a measurable return on their investment in us.

We are a UK based software house, developing OEM ERP Enhancements for the Epicor ERP platform. We also offer SLA support services for everyday Vantage and Epicor ERP usage including maintenance, configuration, upgrade, customisation, service connect, integration, troubleshooting and issue resolution.

We have several small enhancements released which are available for sale on our homepage at www.roiconsul.co.uk. Some of which integrate to the Microsoft Office suite.

Microsoft certified experts with accreditation's in business analysis, project management (inc. Agile), Lean and an in-depth knowledge of Signature.

We can team with you on your ERP, CRM, Web Solutions and other Microsoft Stack based internal or external IT systems and project based IT systems change requirements, and provide impartial advice on the best approach to integrations, c.o.t.s usage, customisation, operational & management reporting solutions.

Significant business process experience in Quote to Cash, CRM, Manufacturing, Distribution & Financials.

With customers world-wide, we can be available to work the timezone that best suits the project or SLA needs. From PST to HKT. With an in-depth understanding of the SDLC (Software Development Lifecycle) and a proven ability to speak to customers in their own language, globally. ROI Consul only work on solutions that we can prove and that are deliverable. All projects are fully managed, documented and tested using our own internal standards, although we will gladly work within your organizations quality and documentation parameters as required.

ROI Consul is a company that prides itself on being able to translate each business process into a technical implementation that is transparent and efficient for it's stakeholders. Our role is to understand how the business user interacts with the system, surrounding technology, the system itself and provide a solution that allows the user to

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do their job in the most efficient, effective and robust manner. This ultimately streamlines the organization, improves employee efficiency and makes life easy for all concerned!

We can integrate your systems into a synergy in which you can reduce cost and time per click, report on daily company activity effectively, as well as provide reporting for historical analysis, KPI Monitoring and improvement strategy.

If your organization uses Epicor EPM, including Performance Canvas, or are planning to do so, we can offer you expert level assistance. This includes EPM Server, Performance Canvas and associated Content packs. All EPM areas are a specialist topic for ROI Consul, having unrivalled and demonstrable project experience of this vertical. We can also offer Epicor SDK Training.

ROI Consul specialize in the following areas:

- Epicor ERP Consultancy
 - SDK and Black-Belt Customisation
 - Epicor Service Level Agreements and Service Contracts
- Business Process Review, 'As-Is' and 'To-Be' Solicitation and Documentation
- Business Analysis
- Software Architecture
- Functional and Technical Design
- Project Management
- Documentation at all levels
- System Integration
- Online and Classroom Training

Visit www.roiconsul.co.uk call 0844 884 5993 or email info@roiconsul.co.uk for info.