

Strategies for a Successful Enterprise Contract Management Solution Deployment



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- Introduction
- What is a Successful ECM Solution Deployment?
- Deployment Strategies
- Best Practices
- Do's and Don'ts



What is a Successful ECM Deployment?

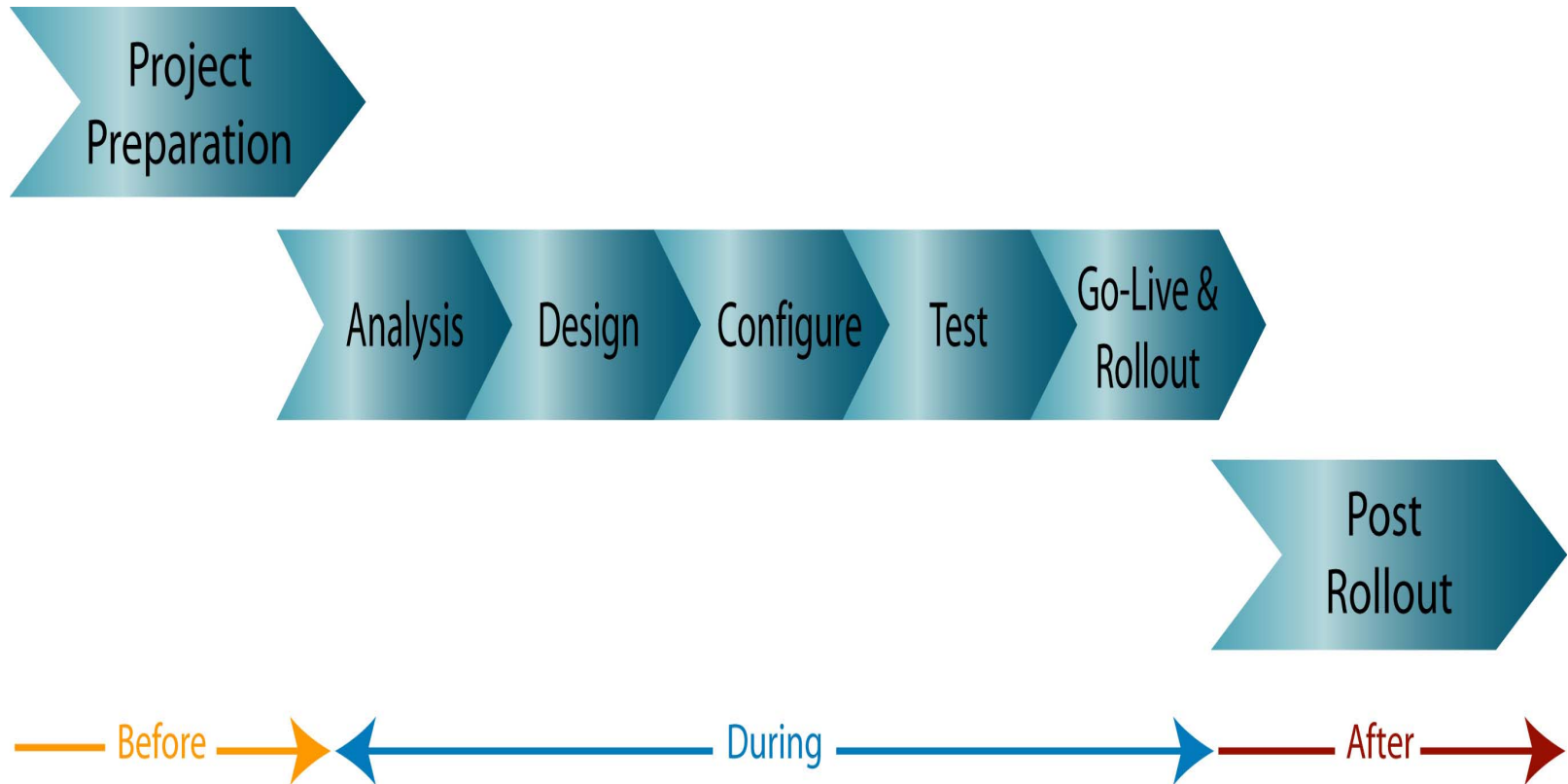
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- On-Time Go-Live
 - Under Budget
-
- Meets and Exceeds Stakeholders' Expectations
 - Visibility
 - Standardization
 - Efficiency and Effectiveness
 - Compliance and Data Quality
 - Integration
 - Ease of Use
 - Reporting and Analytics
 - No Re-Work
 - End User Buy-In and Adoption



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A Typical ECM Solution Deployment

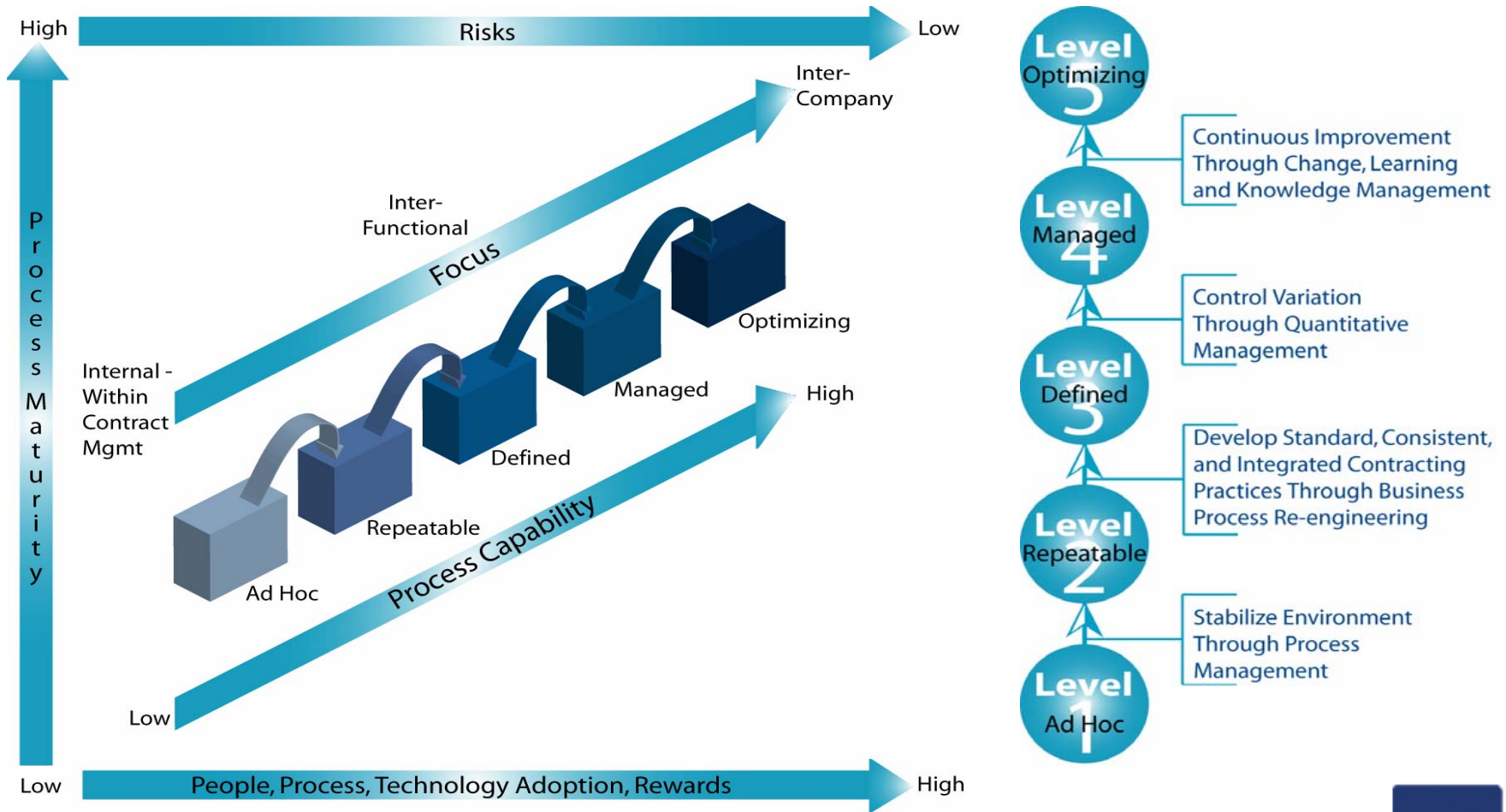


Strategies: Before Deployment

- **Identify** All Stakeholders
- **Assess** Current Capabilities
- **Develop & Communicate** a Shared Vision
- **Build** a Business Case
- **Build** Sponsorship and Commitment
- **Define** Scope and Develop a Plan



Assess Current Capabilities



A Shared Vision of Contracting Excellence

Efficiency

Objective: Streamlined End-To-End Contracting Processes
Target Metric: Reduce Cycle Time by 10%

Effectiveness

Objective: Effective Expenditure of Company's Funds
Target Metric: 80% of Spend Traceable to Contracts

Enterprise Contract Management

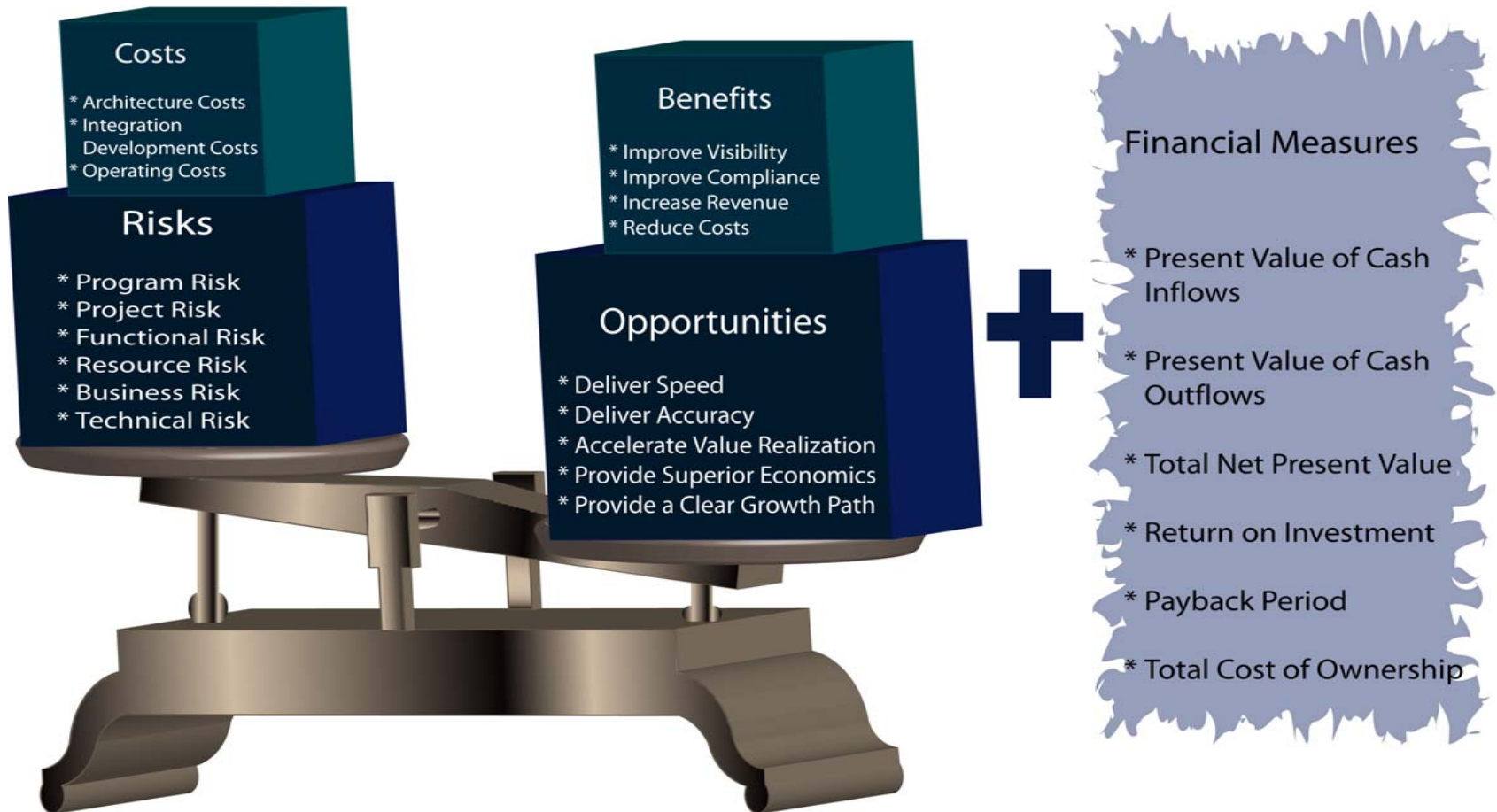
Compliance

Objective: Improved Contractual, Procedural, and Regulatory Compliance
Target Metric: Number & Severity of non-conforming audit ratings

Ease of Use

Objective: User-Friendly Experience for all roles & users
Target Metric: Survey Feedback

Build a Business Case



Build Sponsorship and Commitment

➤ Identify and Dedicate an ECM Champion

- Understands/Believes in Vision
- Translates Vision
- Establishes Sense of Urgency
- Creates Guiding Coalition
- Breaks Down Barriers
- Excellent Communicator
- Well-Respected

➤ Top-Down & Bottom-Up Buy-In

- Process Ownership
- Key Stakeholders involved Understand Requirements
- *“What’s In It For Me?”*
- Communication for Specific Stakeholder Groups



Communication, Communication, Communication

Strategies: During Deployment

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- Project Management
- Change Management
- Risk Management



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Project Management Strategies

➤ Project Planning and Scheduling

- Plan (Tasks, Dependencies)
- Global Template
- Rollout Deployment Template
- “Phased” vs. “Big-Bang” Approach
- Status Updates
- Control Check Points
- Project Scheduling

➤ Scope Definition and Management

- Focus on Enabling Processes, Not on Functionality
- Define Scope for each Phase (Functional Groups, Division, Contract Types, etc)
- Clear and Concise
- Not too Narrow, Not too Broad – Just Right!
- Realistic
- Scope Creep

Project Management Strategies

➤ Project Team Structure

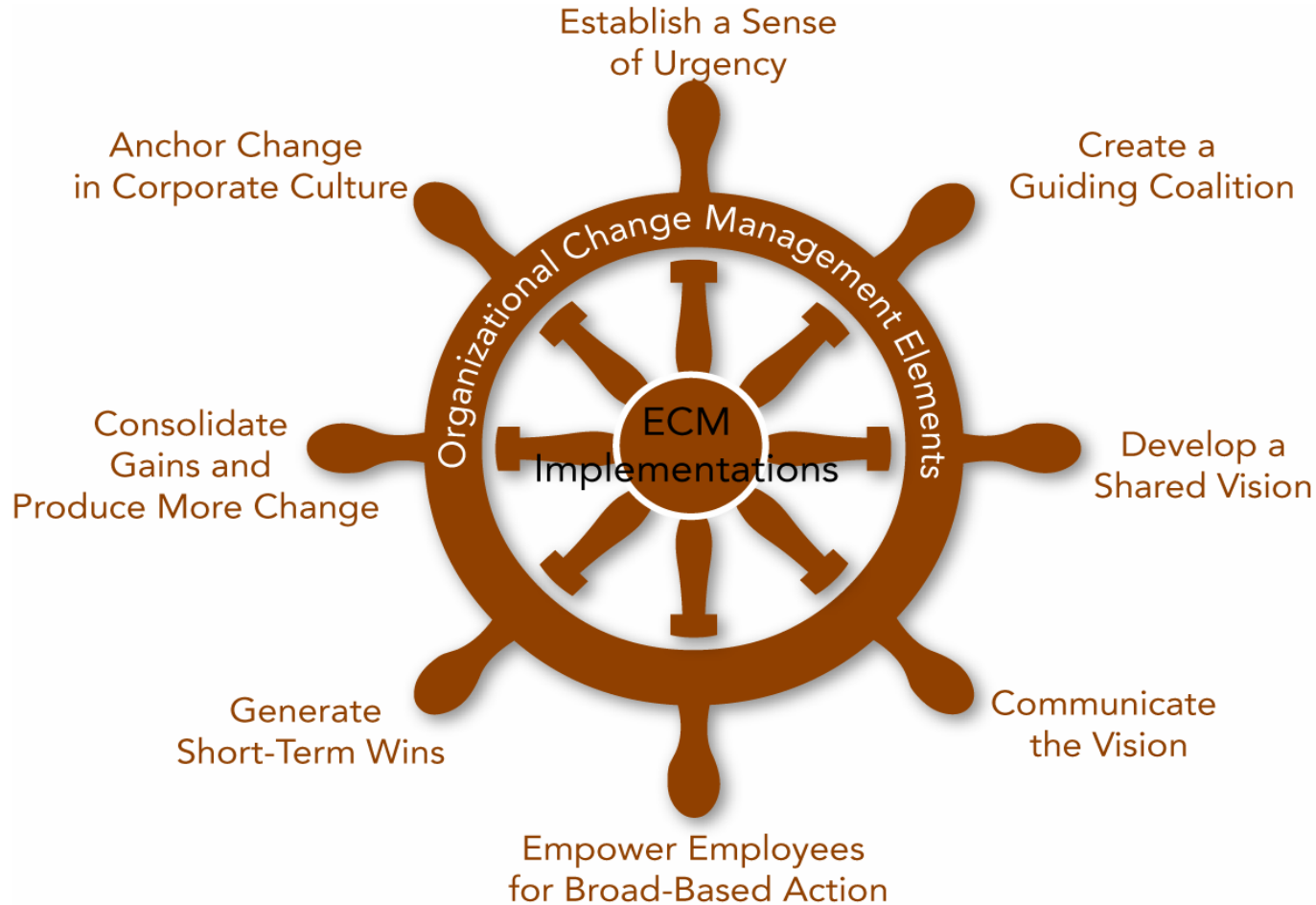
- Functional/Business Processes
- ECM Solutions
- Technical Subject Matter
- Project Management
- Change Management
- Legacy Data Conversion
- Template Development
- Support Team



➤ Project Team Composition

- Procurement
- Sales
- Legal
- Auditing
- Operations
- Maintenance
- Inventory Management
- Accounts Payables
- Accounts Receivables
- Solution SMEs
 - ERP
 - BW
 - Legacy System
 - Portals

Change Management Strategies



Change Management Strategies

- What's Changing Analysis
 - People, Processes, Technologies
 - "As-Is" / "To-Be"
 - Gaps and How to Address Them

- Users, Roles, and Jobs
 - Identify Users, Jobs, Positions
 - Define and Map Roles
 - Security Profiles
 - Leverage Out-Of-Box Roles

- Training
 - Core Team
 - Extended Team
 - End User
 - Tailored to Roles
 - Train Early and Often!



Risk Management Strategies

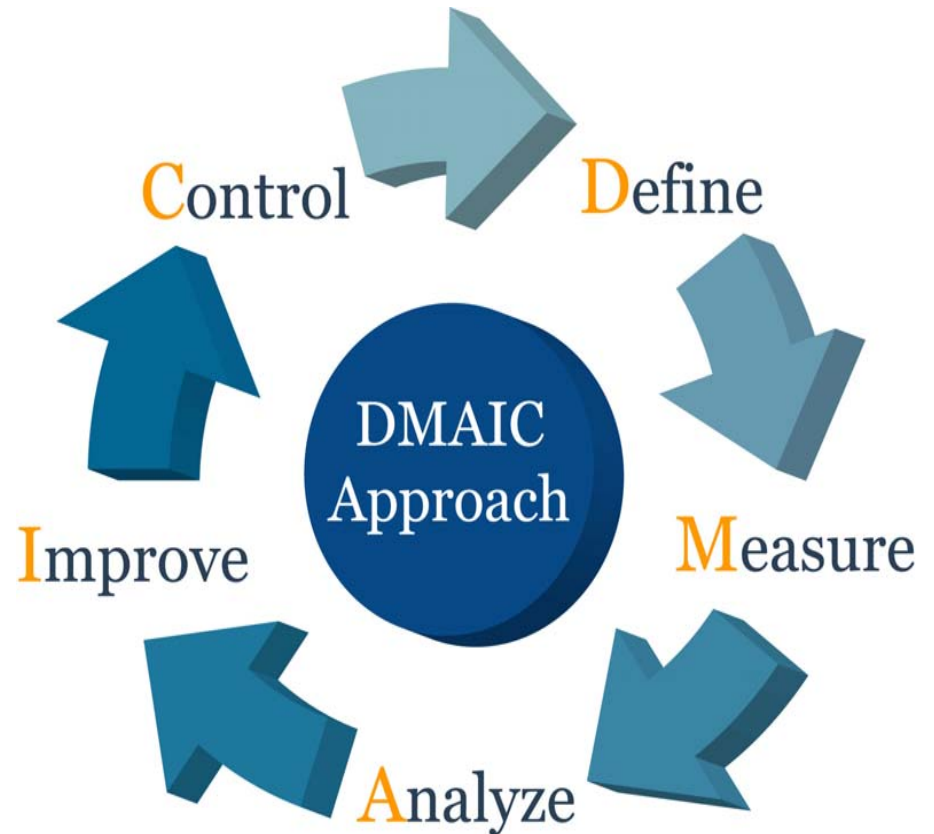


Strategies: After Deployment

Continuous Improvement

Continuous Learning

Continuous Change



Continuous Improvement

- Focus on Data, Metrics, and Analysis
- Expand the Use of ECM Within and Beyond the Organization
- New/Improved Business Processes
 - Templates
 - Business Units
 - Integration with Additional Applications
 - Supplier / Customer On-Boarding
- Process Ownership
- Feedback Mechanism (Surveys, Networks of Excellence)
- Measure and Improve User Adoption
- Recognize Achievements and Reward Teams

Are We Still on the Right Track?



Continuous Improvement

➤ Training

- On-Line Help only Helps to an Extent
- Develop Procedures and Cheat-Sheets
- Gather a List of Tips, Tricks & FAQ's
- Develop Help Wizards
- Refine Training Manuals
- Offer Refresher and 1-on-1 Training
- ECS / Webex / Net Meeting Sessions
- Recorded Training Sessions
- CBTs, e-Learning
- Knowledge Transfer / Exchange Within & Across Organizations

➤ Support

- Deeper & Broader Training
- Staffing Levels
- Broader Skills and Competencies
- Customer Service Attitude
- Tie Performance to Compensation / Rewards



Continuous Change

- System Updates & Changes
 - Processes
 - Org Structure
 - Templates
 - Terms & Approval Rules
 - Data Capture Requirements

- Upgrades
 - Technical Upgrades & Versions
 - Functionality Upgrades
 - Wizards
 - Templates
 - Reports
 - Other People's Paper
 - Interfaces

It is easy to change the things that nobody cares about.

It becomes difficult when you start to change the things that people do care about—or when they start to care about the things you are changing.

- Lorenzi and Riley

ECM Deployment Best Practices

- **Develop and Communicate** a Shared Vision
- **Establish and Ensure** Ownership and Accountability
- **Create** a Compelling Business Case
- **Ensure** Proper Commitment for the Initiative
- **Empower** Employees
- **Engage** in Pro-Active Change Management
- **Involve** Key Stakeholders Early

ECM Deployment Best Practices

- **Share** Responsibility between IT & Functional groups
- **Determine** Where You Are, Where You Want to Be, & How to Get There
- **Define** Business Requirements and Stick to Them
- **Define** Documentation & Communicate Processes and Procedures
- **Define** Realistic, Achievable, Manageable Scope
- **Manage** Contract Portfolio & Create Global Visibility First

ECM Deployment Best Practices

- **Standardize and Automate** Contracting Processes
- **Normalize** Templates
- **Cleanse Data** Before Loading
- **Test and Train** Early and Often
- **Metrics:** Use Few but Key, Strategically Aligned Metrics depending on Current Maturity Level
- **Reporting:** Focus on Developing Reports After Gaining Hands-On Experience with the System

Do

- Limit the number of Decision Makers
- Define and Manage Scope
- Get a Sandbox Environment up early and USE it
- Plan to Stop and Evaluate Progress
- Keep it Simple, and Add Advanced Features/Processes Progressively
- Ensure Production Support is Staffed and Well-Trained

Don't

- Start the Implementation until Key Decision Makers are available
- Allow Scope Creep
- Load Incorrect, Incomplete Data into the Repository
- Add BTVs that won't be used for Searching / Reporting
- Try to Replicate the Old System in a New ECM Solution
- Build a Library without Normalizing and Rationalizing Templates

Path to Sustained Excellence in ECM

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Excellence in Enterprise Contract Management **is not** a race to the finish-line!

It is a **JOURNEY**
that begins with the ECM Solution
Implementation and Rollout.



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