Pre-Implementation Preparation

How to Guarantee a Smooth Source to Pay Project

XOOMWORKS PROCUREMENT

How to get off to a flying start!

During our implementation projects we repeatedly see issues which, due to a lack of preparation, can stall the project.

Some delays can be brief and some much longer, but **all** will weaken the project's momentum.

Conversely, we see clients that are well prepared achieve far greater benefits and outcomes from their S2P investment.

There are a number of high-impact, pre-implementation activities that we can support clients with that will transform the success of their procurement implementation.

In our experience the better prepared a client is, the smoother a project will run, the quicker they will go-live, and the greater the benefits will be from day one.

Pre-Implementation Preparation - Overview

Xoomworks has analysed lessons learnt from over 500 cloud implementations and consolidated the main causes of delays or benefit blockers into a number of topics.

We have adapted the tools, templates and playbook steps from our XoomCloud methodology so that our clients can easily get a head start on their projects, **all achievable 100% remotely.**

Target Operating Model Design	Supplier and Content Data	Core Data and Policy Design	Change Management	Integration
Clients who invest time to ensure their future procurement plans and process are aligned with the project objectives achieve smoother adoption post go-live, improved ways of working, and gain greater benefits from the technology.	The effort required to cleanse master data and prepare suppliers is often underestimated. Investing in upfront identification of desired catalogue content will drive managed and contracted spend with enabled suppliers. In turn, this will drive adoption and usability from go-live.	Delays during design are caused when organisations cannot agree on key data structures e.g. commodity codes, or key policies e.g. approval flows and limits. There are some simple activities that can prepare for this and allow design sessions to focus on more value-add decisions.	Where clients run their own change management activity, we often see this stream of activity starts too late in the project and focuses too much on just email comms and basic training. Some simple, up-front analysis and preparatory activities can result in a much more embedded solution within the organisation.	The most common cause of delays on projects. However, many integrations are common across clients and a significant head start can be achieved by agreeing basic integration principles, frequencies, flows and middleware options.

Pre-Implementation Preparation – Schedule of Activity

Xoomworks will directly engage with your experts and process owners for each of the in-scope functional and technical tracks, to thoroughly review, vet and produce the required deliverables. A typical schedule of activity takes 5 weeks.

Week 1	Week 2	Week 3	Week 4	Week 5
Target Operating Model Design Review				
	Supplier Master Data			
	Data Cleansing and Enrichment			
		Tiering and Enablement Strategy		
		Identify Content Requirements and Resources		
	Core Data and Policy Design Review			
	Change Management Preparation			
			Integration Requirements Preparation	

The program will deliver the following:

- High level Target Operating Model
- High level phased plan with confirmed project scope
- Defined project team roles and effort
- Defined post go-live resource requirements
- Supplier data cleansing initiated
- Segmented and tiered supplier data set with enablement and onboarding strategies identified
- Desired catalogue content identified and validated with Procurement
- Core policies, processes and data models agreed
- Key Change Management stakeholders identified and impact assessed
- Key stakeholders engaged early and business process challenges considered with solution design
- Integration landscape, methods and applications identified
- Transfer of integration material and knowledge to give the integration team a head start

All of which leads to ....

- Richer content, improved data quality and more usable solution at go-live
- Higher level of user adoption and faster time to value due to clarity of blueprint, improved content and change management
- Higher level of spend under management
- Lower implementation costs - up to 20% reduction
- A more productive and engaged project team
- Timely in-project decision making
- Greater focus in project on critical, strategic decisions
- Getting a running start

Target Operating Model and Team Review

The Target Operating Model (TOM) is the blueprint for the procurement function and the future ways of working.

Areas where Xoomworks will advise and support:

- **Target Operating Model definition:**
    - Understand and articulate the strategic, operational and transactional vision of Procurement and Finance departments
    - Define short, medium and long term strategies
    - Ensure the project scope is sufficient to realise this vision
- **Project and Post Go-Live Team Reviews**
    - Define the Project team and Post Go-Live teams to ensure they have:
        - Key Roles assigned to ensure effective delivery
        - Appropriate skill sets and experience
        - Appropriate cross-business representation
        - Ability to deliver – allocated work loading / bandwidth for the project
    - Create a detailed resource workload forecast to ensure availability and commitment of team

As a result, the TOM will ensure the project is aligned to future ways of working and the overall vision.

It will be used from day one on the project to describe the people, processes, policies, success metrics and structure of the future procurement business and will heavily influence the change management and design elements of the project.

Additionally, you will have a clear understanding of the resources and level of effort required.

Supplier and Content Data Review

Supplier and content data is at the core of the usability of a S2P solution and brings the system alive for end users.

Areas where Xoomworks will advise and support:

- **Supplier Master Data Cleansing and Enrichment**
    - Review current supplier base
    - Identify inactive suppliers
    - Identify where multiple suppliers deliver the same commodities / products
    - Identify key data gaps on supplier records and initiate process to close gaps

- **Supplier Tiering / Enablement Strategy preparation**
    - Review and tier active suppliers
    - Define supplier enablement strategies
    - Define appropriate supplier invoicing channels
    - Define appropriate user buying channels

- **Identifying Content – potential PunchOuts / Catalogues**
    - Review content requirements and create content strategy
    - Align with Coupa Open Buy / Coupa Advantage options
    - Review supplier experience in electronic transaction channels and define pre-requisites for content enablement
    - Engage Procurement to initiate review of contractual situations / sourcing opportunities for Go-Live suitability

As a result, you will begin to cleanse and enrich your supplier data, have a clear understanding of which suppliers should be prioritised during an enablement programme and have identified the most appropriate content to help drive adoption.

At go-live, this will lead to improved compliance to preferred suppliers and contracts and create efficiencies with payments and invoice management.

Core Data and Policy Design Preparation

Key data and policy decisions underpin the mechanics of how your S2P solution will work.

Areas where Xoomworks can advise and support:

- **Commodity Structure:**
  - Review current structure and advise on optimum future structure
  - Initiate mapping of GL / UNSPSC Codes

- **Business Process Flows:**
  - Analyse local, global and company-wide alignments and exceptions
  - Understand Use Cases and To-Be requirements considering potential process gaps and how to effectively leverage functionality
  - Assist and advise on best practice to support advisory notes for guided buying

- **Content Control**
  - Review and advise on digital content control structure and define system naming conventions

- **Delegation of Authority Matrix**
  - Review and design digital delegation of authority approval structures

- **Tolerances**
  - Ensure invoice and receiving tolerances are reviewed, standardised, agreed and understood

- **New Supplier Requests**
  - Ensure request process is standardised, captures relevant data, is compliant, and has appropriate controls

- **Testing**
  - Share best practise for planning, facilitation, delivery, and successful exit criteria (SIT and UAT)

As a result, you will start to address the majority of areas that in our experience can potentially hold up project workstreams. Without adequate preparation, simple sounding concepts such as "commodity structure" can tie-up significant workshop effort.

Agreeing these initial concepts up-front frees the design workshops to focus on larger, more valuable decisions, and increases the speed with which the change management stream can begin executing its strategy.

Change Management Preparation

With a new Target Operating Model and new technology, a variety of stakeholders across the business will be impacted. Clear, early change management is required to ensure everyone knows what to do and that the solution delivers the benefits you laid out in the business case.

Areas where Xoomworks can advise and support:

- **Change Management Preparation**
    - Create Change Management Strategy
    - Define Change Management Plan
    - Identify key internal and external stakeholder groups
    - Analyse impact of change to stakeholder groups
        - Interest / Influence / Impact
    - Initial Engagement with Key Stakeholders
        - Understand sentiment / resistance points
        - Capture objectives / primary motivations
    - Review appropriate communications channels and content

As a result, you will have identified the key stakeholders, understand the impact to their current activities, made initial engagements to understand how their requirements can be considered during design and considered how best to communicate to and train affected stakeholders.

Integration Preparation

Integration is the most common cause of delays on projects. However, many integrations are common across clients and a significant head start can be achieved by agreeing basic integration principles, frequencies, flows and middleware options.

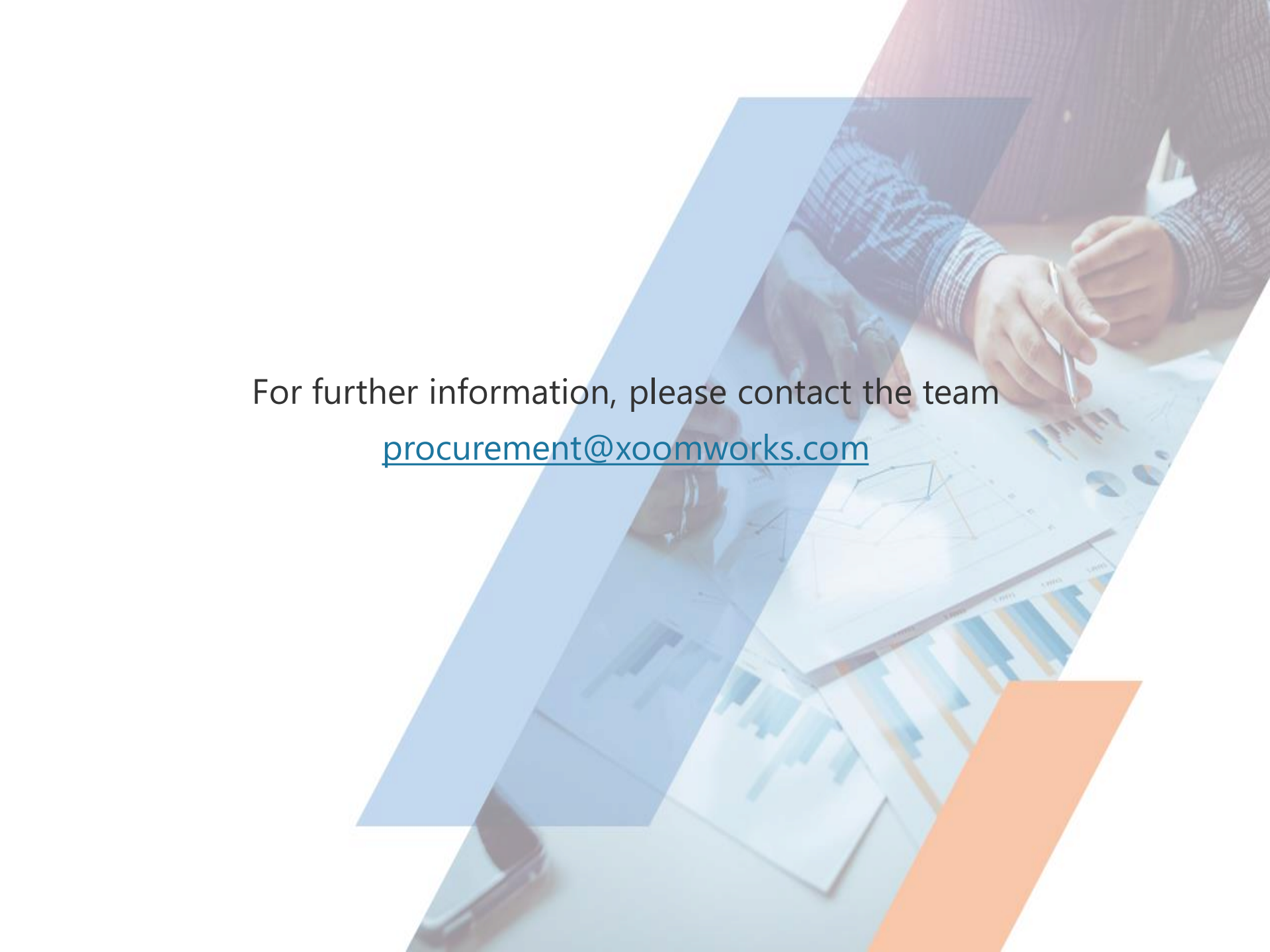Areas where Xoomworks can advise and support:

- **Integration Preparation**
    - Confirm landscape of systems to be integrated
    - Confirm data objects that will be integrated per system
    - Identify Integration resources based on system experience and expertise
    - Confirm Middleware application
    - Confirm method of Integration (Flat File (CSV) / API)
    - Confirm project scope covers expected integration processes
    - Share appropriate integration resources and documentation for identified solution - allowing Integration resources time to research and prepare

As a result, integration systems, data objects, middleware and methods will be confirmed, allowing the appropriate personnel to engage and educate themselves on system requirements, ensuring a smooth progression through the critical path of the project.

This greatly reduces risk of delays during the project and ensures the optimal solution is designed.

For further information, please contact the team

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