Digital Modernization and Adoption Plan

SPANTECK
E-MANAGEMENT SERVICES

DIGITAL TRANSFORMATION

Digital Adoption Consultant : Vikas Karulkar

Digital Modernization and Adoption Plan (DMAP)

The Digital Modernization and Adoption Plan (DMAP) program supports Ontario SMEs to better understand their organization's technology needs, guide their digital transformation decision-making, and optimize their technology investments. Through this program, SMEs work with a Digital Adoption Consultant to generate a Digital Modernization and Adoption Plan tailored specifically to their organization's digital needs.

This program is administered through Ontario Centre for Innovation (OCI).

BEST SUITED FOR:

• SMEs looking to understand their digital needs and adopt and implement digital technologies to grow their company
• Ontario-based for-profit SMEs with between 1-499 employees

DMAP Eligibility Requirements for Applicant

- Be incorporated federally or provincially with a valid Business Number

- Be a for-profit, privately owned business

- Have between 1 – 499 full time equivalent employees

- Have a change management culture and structure that values growth and innovation, willingness to review/adopt new technologies to support scaling

- Have the ability and willingness to invest resources

- Have the capability to implement and internally sustain new technologies

- Be able to express why they need a digital strategy and recognize its importance in guiding change

- Have a permanent establishment in Ontario

DMAP Projects

- Grant of up to $15k toward expenses of a Digital Adoption Consultant (DAC) to develop the technology adoption plan.

- Plan should be unbiased advice that identifies 3 potential options that could be pursued

- 50% reimbursement of consultant fees

- Project duration: 3 months

Technology Demonstration Projects

- Grant of up to $150k toward expenses associated with implementing the digital adoption plan

- 50% reimbursement of implementation expenses (e.g., software subscription, equipment, internal and external wages)

- Project duration: 6 months

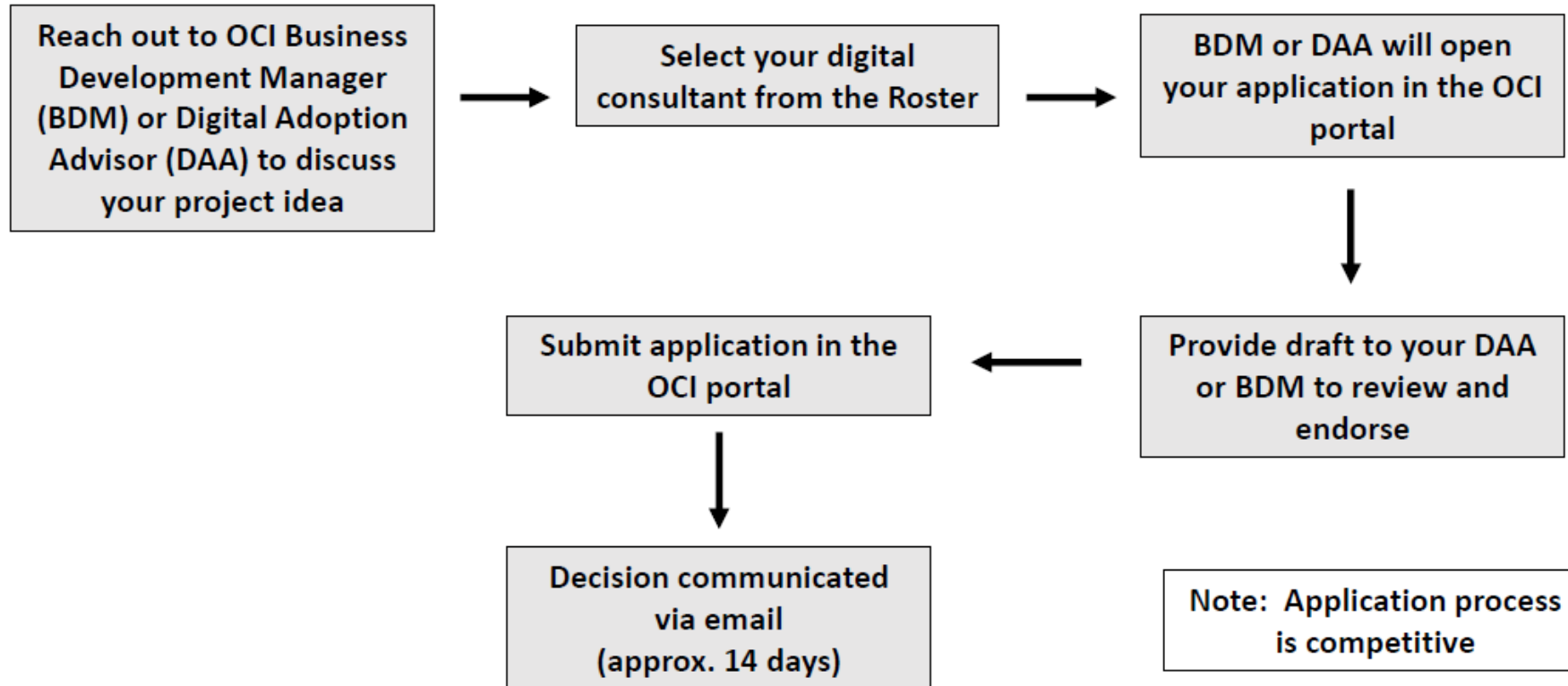- Open to firms that reported $500k in revenues in one of last three tax years.

How Funding Works in DMAP

OCI Contribution	50 per cent (maximum) of total eligible project costs, up to $15,000
Applicant Contribution	50 per cent (minimum) of total eligible project costs (i.e., minimum 1:1 match to OCI contribution)

Example	Total eligible project costs: $30,000 • Maximum OCI contribution: $15,000 • Minimum applicant contribution: $15,000 cash
Funding Recipient	SME applicant company

DMAP Application Process

Reach out to OCI Business Development Manager (BDM) or Digital Adoption Advisor (DAA) to discuss your project idea → Select your digital consultant from the Roster → BDM or DAA will open your application in the OCI portal

Provide draft to your DAA or BDM to review and endorse → Submit application in the OCI portal → Decision communicated via email (approx. 14 days)

Note: Application process is competitive

Spanteck Corporation

Spanteck Corporation is an approved Digital Adoption Consultant (DAC) on Digital Consultant Roaster with OCI

Spanteck Corporation is a federal corporation, head quartered in Toronto, Ontario. Spanteck Corp. started its operations in September 2020.

Spanteck Corp. is led by Vikas Karulkar with an idea to provide advisory and consulting services in digital transformation and energy sector.

Spanteck Corp. is providing digital transformation advisory & consultancy through its franchise partner ValentaBPO Outsourcing Inc.; Valenta's service portfolio is extensive in the filed of digital transformation.

Valenta is a global technology company that specialize in process consulting, digital transformation through robotic process automation & artificial intelligence, and staff augmentation in IT & non-IT skillsets.

Valenta is an approved digital advisor with Canada Digital Adoption Program (CDAP) and Vikas Karulkar is providing digital advisory services for CDAP qualified clients across Canada.

Promoter's Profile

Vikas offers extensive experience with a successful record of accomplishments in leadership, team building, and strategic planning & execution. Vikas has acted as an interface between sales, business development, and key account management to unleash growth for organizations focused on B2B and B2C environments. He is an energetic, focused "goal-oriented" individual with business acumen, who moves easily from vision and strategy to implementation, problem-solving, and follow through.

As a critical thinker and skilled individual at cultivating long term alliances with key decision makers, Vikas leads businesses that yield high and sustainable results across various markets. Vikas possesses strong interpersonal and communication skills; and is a polished, persuasive, and collaborative leader who can identify opportunities for innovation and productivity.

Being a motivated leader with strong organizational and prioritization abilities, Vikas is in an excellent position to leverage his skills and help grow every business in all three key pillars of process optimization, digital transformation and outsourced staffing, offered by Valenta.

CONTENTS

DEFINE

Key Considerations

Scope of Work

DEVELOP

Taking a closer look at Operations

Our Approach

Taking a closer look at Zoho Suite

Assessing & Enhancing Zoho Suite

Adopting the Zoho Marketing Suite

DEMONSTRATE

Project Roadmap and Fee

About Valenta

Our Core Capabilities

Our Network and Delivery Centers

Benefits to you

Delivery Team Background

KEY CONSIDERATIONS FOR THE ENGAGEMENT

PROCESS

Define clear process workflows for all key activities integrating Zoho thereby incorporating more control

Align Zoho with the current process to make it for streamlined and efficient

Identify points of information capture through the workflow and ensuring minimal manual intervention

TECHNOLOGY

Determine the nature and extent of automation possible using the Zoho One technology infrastructure

Make necessary changes in design and customisations within the Zoho platform

Ensure smooth operations and optimal information flow and capture with the use of Zoho platform and applications

PEOPLE

Define roles and responsibilities for process participants

Define threshold limits and key authorisations within the team for review and approval

Orient the team in relation to the changes in process and technology and the resulting impact on their day to day activities

SCOPE OF WORK (TENTATIVE) – EVENT UNIVERSE

CRM

- Identification of Clients
- Enquiry Handling
- Conducted Scheduled Tours
- Information Gathering
- Quotation and Estimation
- Contract Finalisation

PROJECT MANAGEMENT

- Event Planning and Initiation
- Submission of Requirement Confirmations from Clients
- Event Monitoring
- Identification and Coordination with Vendors

PROJECT MANAGEMENT (CONTD)

- People Management on Event Day
- Client Interaction and Information exchange (project duration)
- Change Management
- Document Management
- Event Closure and Payouts

FACILITIES AND ADMINISTRATION

- Purchases
- Vendor Management
- Inventory (assets management)
- Information Security and Access
- Configuration

FINANCE & ADMINISTRATION

- Invoicing Clients
- Vendor Payments
- Expense Management
- Follow Up and Collections
- Reporting (across operations and finances)

OTHERS

- Client Feedback
- Digital Presence – Social Media and Web portal

TAKING A CLOSER LOOK AT OPERATIONS AND INFORMATION FLOW

There is a need to Define clear procedures for all the key processes across functions which will include breakdown of key activities to develop an operating framework that has a governing set of guidelines for every operation.

WHAT

- What are the key activities that need to get done and in what order?
- What needs to be automated and to what extent?

WHY

- Why is this activity part of the operational design and how does this impact operational effectiveness?

WHEN

- When does an activity need to be performed and in what frequency?

WHO

- Who needs to perform this activity?
- Who is responsible for review / approval of the same?

HOW

- How does one execute the task in the most efficient manner?
- How many resources are required for the task?

OUR APPROACH

UNDERSTAND	ASSESS	REDESIGN	PRIORTISE
Understanding your organization, the industry it operates, leadership vision and future roadmap	Evaluate the current operating and risk management framework in light of organizational objectives	Highlight Key Concern Areas & present revised Design and Implementation Blueprint	Develop revised Operational Framework and orient workforce
Interview Senior Management and Middle Management through discussions to understand ■ Vision ■ Scalability plans ■ Challenges faced in operations ■ Lack of control measures ■ Current performance assessment	■ Assess the current operating structure ■ Evaluate the IT infrastructure ■ Interview all stakeholders and process participants ■ Assess documentation availability and requirement ■ Assess cross functional dependencies ■ Assess risk exposure ■ Areas of revenue leakage if any	■ Breakdown of key processes into sub processes ■ Develop " To Be Processes" which will mitigate the gaps and exert control, standardize processes across functions ■ Development of templates and checklist for information capture ■ Integrate the new ZOHO interface with the new processes ■ Institute a robust monitoring and reporting mechanism	■ Develop an operating framework with clear lines of reporting and control ■ Segregate roles and responsibilities amongst process participants ■ Develop the MIS framework with focus on design, nature and extent of information (dashboard elements) ■ Obtain management buy in on the Way Forward ■ Orient the employees with respect to new workforce

TAKING A CLOSER LOOK AT ZOHO UNIVERSE

Interface with Bank for Auto - population of transactions

Bank Reconciliations

ZOHO CRM
Leads, Quotation & Client Master Via CRM

Invoice Accounting

Receivables Reconciliations

ZOHO Projects
Management of Contracts Via Projects

Customer Contracts / Claims / Discounts

Sub Contractors & Vendors

Vendor Bills/ Overheads

Payables Reconciliations

Collection
- Master Management
- Collection Accounting
- Vendor Invoice Processing
- Credit Note
- Reconciliations

Payments
- Payment Processing
- Payroll Accounting
- Cash Flow Statement
- Periodic Activities

Approval Request

Approval Received

Authorised persons

Payment Processing Post Approval

Vendors/ Payees

Payment Processing (Regular Bills)

Vendors/ Payees (Rent, Utilities etc)

ZOHO Books

ZOHO Expense
Employee Expenses Reimbursement

Inventory Management

Storage & Backup of related documents

ZOHO WorkDrive

FP&A through Analytics

ASSESSING & ENHANCING ZOHO SUITE

Striving to answer the following specific questions pertaining to your business

How will information flow across functions?

How can projects be classified and defined at a task level? How do we monitor projects real time?

How do we allow for easy flow of information and access to project related documents ?

How can new effectively manage our sales pipeline?

How can we interact with the Clients through the portal?

Can we pull specific reports using existing data that will help us make effective decisions?

How can we manage our invoicing and follow up?

Is there a mechanism to track and optimize inventory?

ZOHO One

ZOHO Books

ZOHO CRM

ZOHO Forms

ZOHO Projects

ZOHO Backstage

ZOHO Inventory

ZOHO Creator

ZOHO Analytics

ZOHO Expense

ZOHO WorkDrive

Note : This is a tentative scoping exercise with respect to choice of modules within Zoho One. This will be refined and tweaked during the course of the project

ADOPTING THE ZOHO MARKETING PORTFOLIO

Zoho Forms — Email & Notifications
→ Design unique and customised Forms to send to your customer base.

Zoho Survey
→ Online surveys for every occasion.

Zoho Campaigns
→ Design, Develop and run campaigns. Reach and engage your customers.

Zoho Meeting
→ Host secure online meetings and engaging webinars.

Zoho Social
→ The all in one social media management software.

Zoho PageSense
→ Conversion rate optimization software.

Zoho CRM
→ End to end CRM solution to manage your Clients and pipeline.

Zoho Desk
→ Ticketing software to ensure high levels of customer service.

Zoho S
→ Create, collaborate, present, broadcast, and publish presentations, the smarter way.

Zoho Sites
→ Design mobile friendly websites

PROJECT ROADMAP & FEE - PROCESS MAPPING AND ZOHO SET UP

PHASE	DESCRIPTION	TIMELINE	PROFESSIONAL FEE	RESOURCE ALLOCATION
PHASE 1	Review & Understanding of business operations – Recommendations to streamline and make processes efficient. Analysis & Recommendations on Zoho Modules – Finalising the system design and modules	2 – 3 weeks	▪ 15000 USD for the entire duration of the project payable in three installments.	▪ Process Consultants Plus 1 Zoho Consultant / Developer
PHASE 2	▪ Designing the technology platform Zoho to meet Manors requirement including customization to meet business requirements for all functions ▪ Development of standard operating procedures for each function highlighting key process steps and extent of use of zoho ▪ Training of workforce with respect to the technology and revised process design	7 – 9 weeks		▪ Process Consultants Plus 1 Zoho Consultant / Developer

Note: We would require a dedicated Point – of – Contact from the client's team to help us arrange meetings and gather the required documen ts and interview the key process owners
Status updates will be provided to the Senior Management on a weekly basis during course of the Engagement.

PROJECT ROADMAP & FEE – MARKETING

PHASE	DESCRIPTION	TIMELINE	PROFESSIONAL FEE	RESOURCE ALLOCATION
OPTION 1	▪ High level auditing, optimization, strategy development, reporting, execution and co - ordination of virtual marketing team. ▪ Execution of content marketing plan for SEO & blogs, EDMs and other relevant mediums. ▪ Execution of website optimization strategy, content updates and development of landing pages (if required). ▪ Execution of design including infographics, imagery updates, EDM template development and general design application as required across all digital platforms.	Ongoing on a Monthly basis	▪ USD 5500 per month	▪ Digital Marketing consultant + Content
OPTION 2	▪ Website integration >> sending website lead forms direct into Zoho ▪ Zoho social >> dashboard creation (and activation of this part of Zoho) ▪ EDMs: Development of an EDM drip campaign based on triggers, quote to accommodate integration with MailChimp and setup of 12 EDMs (Daniella, The Manors Marketer, to provide content and graphics)	One time	▪ USD 5500 per month	▪ Digital Marketing consultant + Content

Note: Status updates will be provided to the Senior Management on a weekly basis during course of the Engagement.
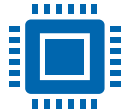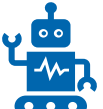
ABOUT VALENTA

Valenta is a multi - faceted company that assists hundreds of businesses across the world improve efficiencies through Process Consulting, Digital Transformation through RPA & AI and Outsourcing services With Service Delivery centres across the globe , we help companies achieve their ambitious growth objectives through bespoke solutions. Valenta reimagines your business processes while intelligently digitizing and compressing manual workflows. In doing so, we empower our clients to focus on the opportunities with the highest business impact that will drive operational efficiency and profitability further.

Organisations that thrive in the digital transformation era are those who have optimally blended these operating elements and aligned with their digital strategy thus gaining a significant competitive advantage

PHASE I
PROCESS CONSULTING

PHASE 2
DIGITAL TRANSFORMATION

PROCESS

BENEFITS

Optimal
Performance Zone

Where we come in

Where we come in

Where we come in

TECHNOLOGY   PEOPLE
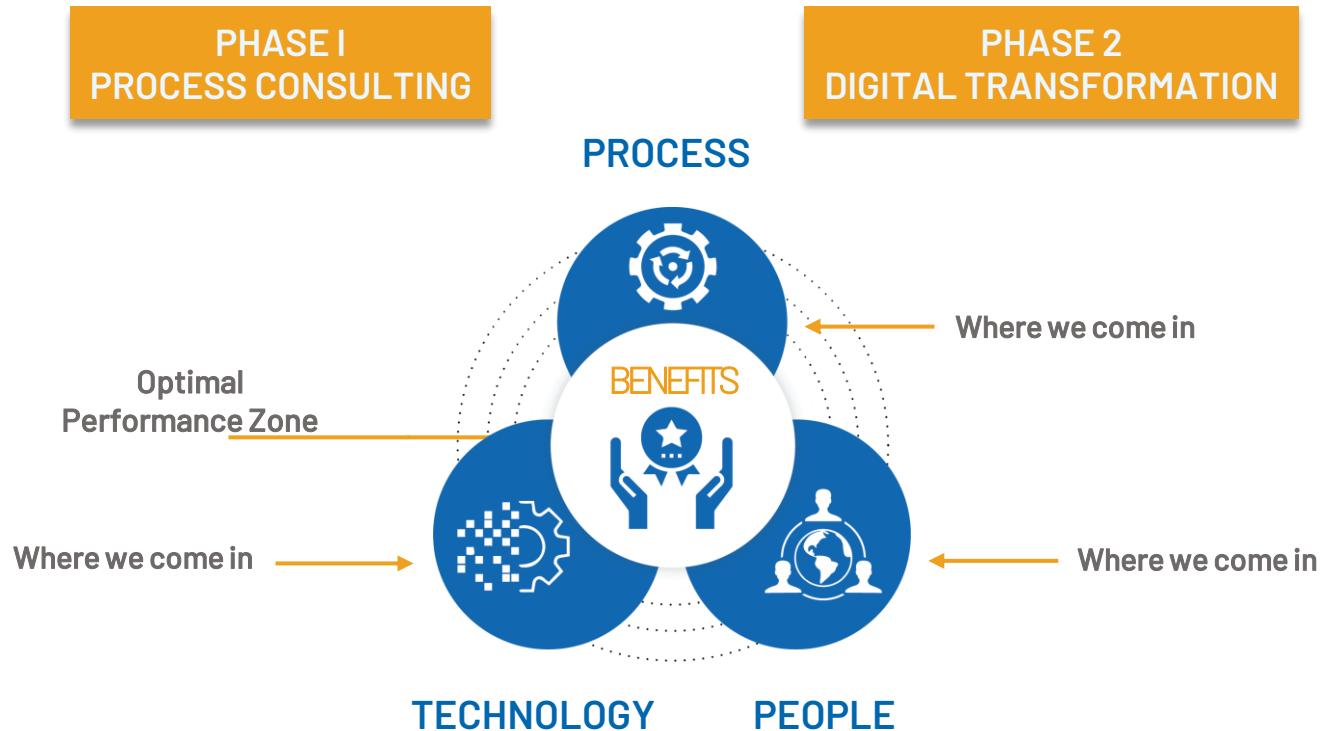
TOOLS USED FOR REIMAGINE BUSINESS OPERATION

Process Consulting	Digital Transformation	Outsourcing
Robotic Process Automation	Computer Vision	AI and Machine Learning
Document Understanding	Intelligent Conversations	Insights

OUR CORE CAPABILITIES

	AUTOMATION		KNOWLEDGE MANAGEMENT		INTELLIGENT MONITORING		AUTONOMOUS OPERATIONS
	Runbook Automation		Natural Language Understanding		Business Transaction Monitoring		Autonomous Monitoring
	Self Service Workflows		Data Fusion and Computer Vision		User Behavior Monitoring		Anomaly Detection
	Cognitive RPA		Knowledge Graph		Support Activity Monitoring		Fault Prediction
	Robotic Process Automation		Dark Data Mining		Application Performance Monitoring		Preemptive Intervention
	Self Service Virtual Assistants		Cognitive Search		Business Performance Monitoring		Self Healing
	...		...		...		...

OUR NETWORK AND DELIVERY CENTERS

USA & CANADA

UK & EUROPE

MALAYSIA

PHILIPPINES

OPERATIONS

CORPORATE

MANAGING PARTNERS

AFRICA

AUSTRALIA

INDIAN SUBCONTINENT

TRINIDAD & TOBAGO

NEW ZEALAND
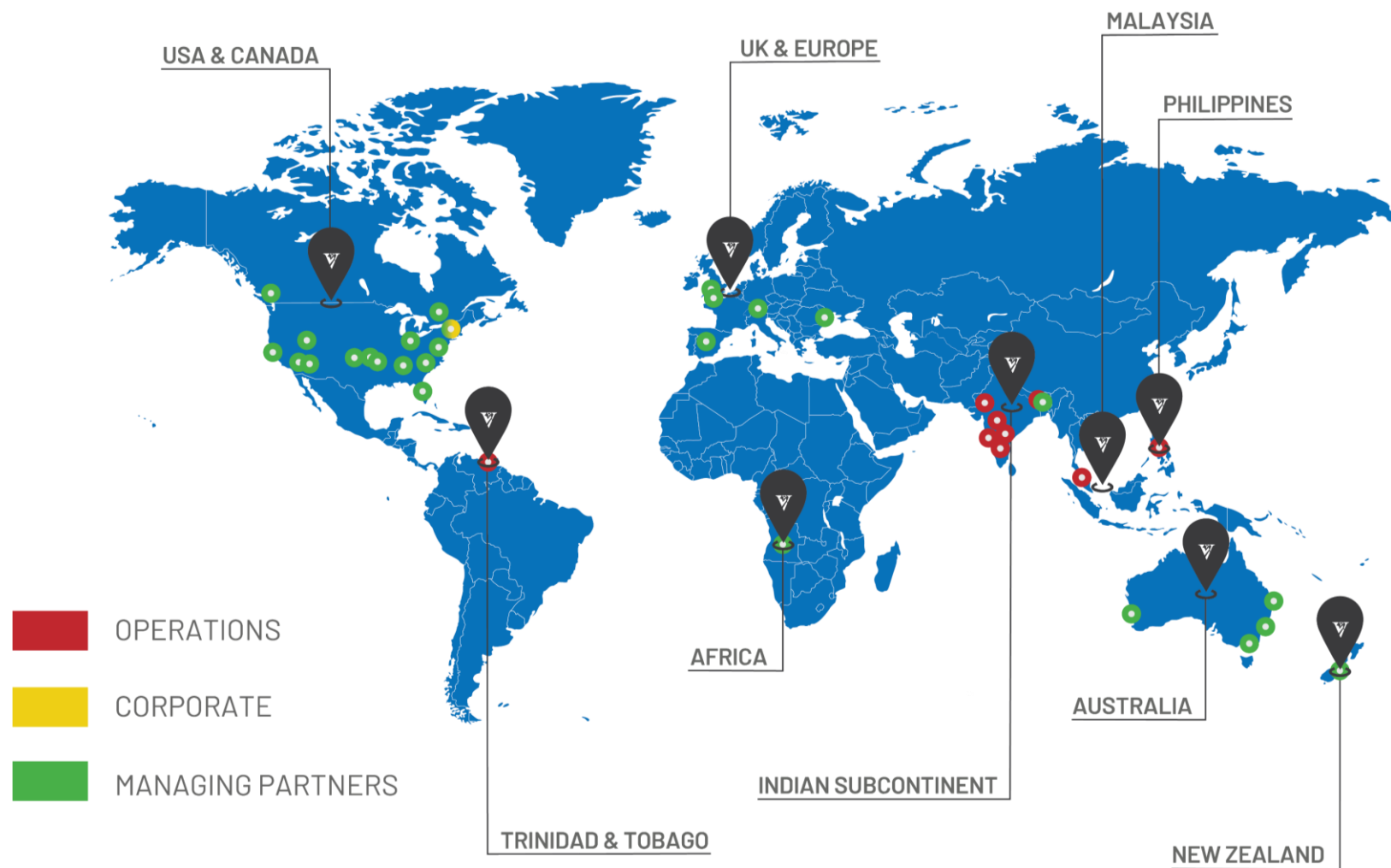
BENEFITS TO THE CLIENT

- Standardized process flows and execution across all verticals and departments

- Guidelines for conducting on - going activities and controls across all functions

- Greater management focus on key issues and risks to enable doing the right things in the right way

- Optimal use of people, process and technology that will garner efficiency and institute cost optimization techniques

- Develop strong internal controls that effectively mitigate and manage risk

- Key stakeholders identified, segregation of duties is established and succession planning

- Institute robust monitoring and reporting mechanisms with focus on nature, format and frequency of MIS

- Ready reference available for training of workforce

- Cost Optimisation along multiple elements of the operating lifecycle

- Communication Strategy to ensure that channels between the service delivery center and the head office are optimal to meet business requirements

- Paving the way for future work migration with focus on Digital Transformation through automation and other elements

DELIVERY TEAM
BACKGROUND &
STRENGTHS

AISHWARYA RAVINDRAN
Business Consultant
Model Business Process & System Migration

ABOUT AISHWARYA RAVINDRAN

Aishwarya Ravindran, is part of the Process Consulting Vertical of Valenta BPO.

- Associated with the Risk Advisory Discipline of one of the Big 4 Advisory Firms
- Development Sector experience as Program Head for a London based NGO (education domain)
- Business Consulting engagements offering varied solutions across industry types
- Project Management and Design Thinking background

She believes that consulting is providing an optimal mix of people, process and technology solutions to each Client and that ideal combination differs for every organisation of varying scales and industry types. Focusing on digital transformation, process streamlining, and capacity building in various forms will build an effective operating framework which will accelerate business performance and increase stakeholder value.

Sector Experience

- IT Services & Outsourcing
- Real Estate & Interior Design
- Healthcare & Clinic Management
- Retail & Store Management
- E-commerce
- Manufacturing
- Education
- Development Sector
- Event Management
- Media & Production

Areas of Expertise

- Digitization of Operations
- ERP Review, Adoption & Migration
- Standard Operating Procedures
- Organization Re-structuring
- Risk & Control Management
- Project Management
- Content Creation
- Corporate Event Management
- Training & Development

ABOUT GAUTAM SAMTANI

Gautam Samtani, is part of the Process Consulting Vertical of ValentaBPO. He brings with himself prior advisory experience with one of the BIG 4 Audit firms.

He is a Certified Internal Auditor and has over 15 years of experience in Management & Process Consulting.

He believes the world is changing as we speak & organizations that adopt Strategic Agility and Operational Robustness tend to have a competitive edge. Process Consultants work on-site with the Management to diagnose pain points and improve the organization's effectiveness by streamlining operations, removing bottlenecks, reducing errors & addressing redundancy.

Bottom line, our aim is to support clients in the realization of their ambitions by providing expertise in specialized areas.

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- Content Creation
- Corporate Event Management
- Training & Development

Vikas Karulkar

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Thank You