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DIGITAL TRANSFORMATION w OCI (Ontario Centre of Innovation)

Digital Modernization and Adoption Plan – Overview

Digitalization Competence Centre (DCC) is Ontario's knowledge center focused on driving the digital modernization of Ontario

Digitalization is redefining the future for companies. It is a critical factor in the success and growth of Ontario's companies, enabling them to release products to the market faster and reach the right customers, all while offering a near perfect experience.

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

Digital Modernization and Adoption Plan – Overview

Through DCC, Ontario is placing its SMEs at the forefront of digital transformation, supporting them to adapt and thrive from this digital evolution.

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.

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Objective & Benefits

The program provides an opportunity for Ontario SMEs to identify and bridge barriers to adoption of digital technologies

- support digital literacy (Access to Expertise, latest Knowledge & Information)
- accelerate digital adoption (Training, Process understanding facilitating adoption)
- increase competitiveness in the digital economy

Benefits to the Applicant

- Better understand your organization's technology needs and receive expert guidance for your digital transformation decision-making
- Optimize and accelerate adoption of new digital technologies, minimizing costs
- Modernize and enhance the competitiveness of your products and services
- Achieve increased efficiencies in business operations by automating processes
- Connection to funding partners to support the implementation of your digital technology plan

Eligibility

- 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

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Process & Funding

Discuss your project idea with BDM* or DAA** (Listed on Roaster) → Complete online application – AccessOCI → Endorsement of Application by BDM/DAA → Submit the Application → OCI will complete review → SME will be notified of decision in 1-2week

*Business Development Manager
**Digital Adoption Advisor

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

Registered in Ontario, 2814475 Ontario Inc. (o/a **AscensionDX**) is operating since early 2021, Lead by Alpesh Patel.

AscensionDX 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.

It supports Small and Medium businesses by offering:

- Business Process Consulting

- Digital Transformation (Robotic Process Automation (RPA) & Artificial Intelligence (AI)

- Staff Augmentation (Temporary & Full time IT roles, Accounting skill sets, Virtual Office Admin roles)

- Training and Development through LMS

Alpesh is an innovative, dynamic, and service driven professional with two decades of progressive leadership roles. A passionate leader exhausting all avenues to improve processes, influence people positively with delivering experience through technologies.

As a value-add entrepreneur he has worked with many businesses in Healthcare, Finance & Accounting, Retail, Construction and Manufacturing. Helping businesses leverage process optimization strategies and digitalization technologies to develop quality sustainable solutions.

Facilitating growth and scaling of client base across geographies. He brings a wealth of insights to help his clients identify and adopt the right technological solutions in most affordable ways.

Alpesh will facilitate the way of How people in your business collaborate with technology to accelerate adoption and boost efficiencies through systematic analysis of business canvas.

Everything we do is about helping our clients focus on and have time for what they do best ... their core mission

We do this through **process consulting,** where we identify & qualify processes to automate with **digital transformation,** and support sustaining with **Training**

Process Consulting

Digital Transformation

Training
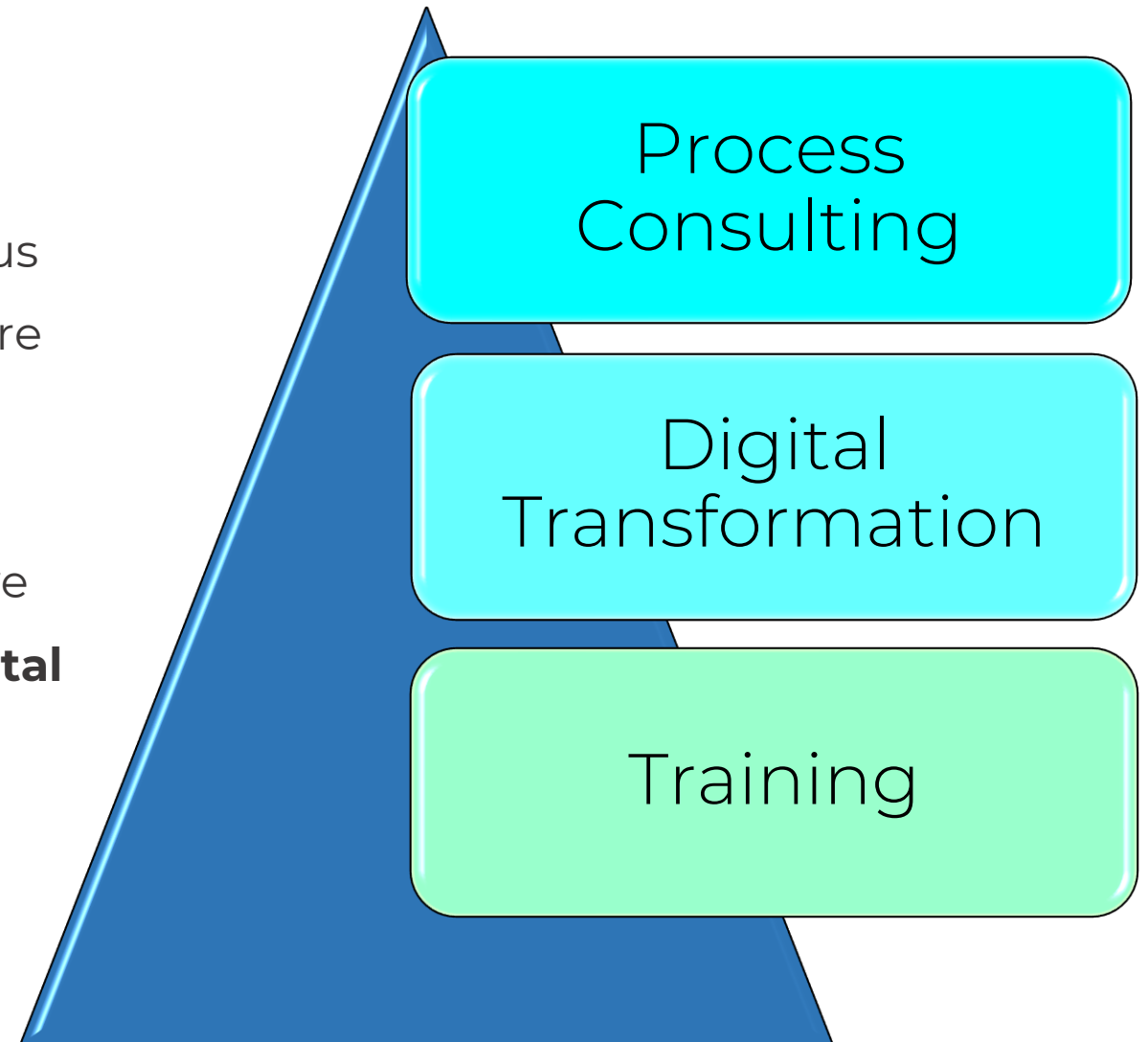
WHO WE SERVE

Financial Services

Manufacturing

Construction

Medical

Renewable Energy

Cyber Security

Consumer Goods

Telecommunications

Professional Services

Interiors and Furnishing

Property & Real Estate

And More...

Business Process Consulting

VALENTA APPROACH FOR SOFTWARE INTEGRATION CONSULTING

Understanding & mapping of all requirements of the business

Identification of a suitable Vendor / Platform / SAAS

Vendor Sign Up, Coordination & Migration of Data

Go Live & Ongoing Support

CASE STUDY 1: MEDICAL OFFICE CLIENT

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KEY BUSINESS CHALLENGES FACED BY CLIENT

No online consulting → Desktop based ERP → Patients appointments only through Phone Calls during work hours → No Real Time Scheduling → Scattered Electronic Health Reports of Patients

Tiresome Consumables Management ← No Control over Stock ← Ineffective Operation Theater Booking ← Absence of a reporting system customized to enable effective decision making ← Clinics working in silos

Time consuming Compliance Reports → Not Integrated to the Accounting Software → Poor Vendor Payment Cycle

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VALENTA

- Link created in the Clinic's website for hassle-free online bookings

- Patients can book online consultations

- Colour - coded time slots to optimize patient flow

- Automated appointment reminders by text

- Platform is HIPPA and GDPR Compliant

- During an appointment, the Doctors can fills out a form, creates a treatment regime & formulates prescriptions digitally

KEY ACHIEVEMENTS

- Platform integrated to Xero (used by outsourced Finance Function)

- Keep an eye on your audit trails to see who did what and when

- Set up tasks, invoices and follow-up visits all on a single page

- Add test results directly from labs to the comprehensive

- Automating your paperwork, including consent forms and prescriptions

- Unified Patient Medical Records

- Patients have access to their own Portal

- Accounts Receivables & Payables digitized

- Control over Stock & Consumables

- Automatically generate accurate invoices for all services rendered

- Accounts Receivables & Payables digitized

CASE STUDY 2: CYBER SECURITY FIRM

SAMPLE CASE STUDY: CYBER SECURITY FIRM

CLIENT

Organization operating in the cyber security domain providing Products and Services to the Federal Government. They were facing the following problems:

- Absence of an Order Management System tracking key elements of the Order to Cash Process

- Absence of a Project Management System to track service contracts that have a year long billing cycle and delivery mandates

- Limited visibility into Purchase to Pay process due to the unique product – service portfolio of services offered by the Client

- Commission for Sales Personnel and Provision of Estimates calculated outside of the system

- Lack of visibility across the value chain from Sales Operations to Finance owing hindering real time monitoring

- Under utilization of ERP Interface with heavy reliance on spreadsheets to support key operations

- Absence of timely entry of financial data in the system thereby indulging in duplication

- Lack of data hygiene maintained leading to inaccurate and duplicate master data

SCOPE OF WORK

- Assisted in the Shortlisting and Finalization of a suitable ERP

- Configuration of an Orders Module and Tracker in CRM, that tracks the order from the quotes stage till the shipment and delivery to the customer

- Configuration of a Projects Module that enables real time project tracking

- Automatic tracking of Sales (invoices) and Purchases (bills) in relation to orders within the CRM Order record

- Ensures timely and accurate invoicing to the Customers and pay-outs to the subcontractors through the project lifecycle

- Configuration of a Commission Module for tracking the commission for each order / service contract. Revision in structure of Templates and Formats across key workflows

- Development of MIS for senior management review and follow up

BENEFITS

- Standardized process flows and execution across key operations maximizing the use of system for information capture

- Reduced manual intervention and redundancy across key operations

- Optimal use of people, process and technology that will garner efficiency in operations

- Ready reference available for training of workforce

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

- Paving the way for future work migration with focus on Digital Transformation through automation and other elements
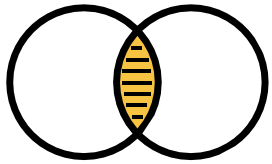
Digital Transformation
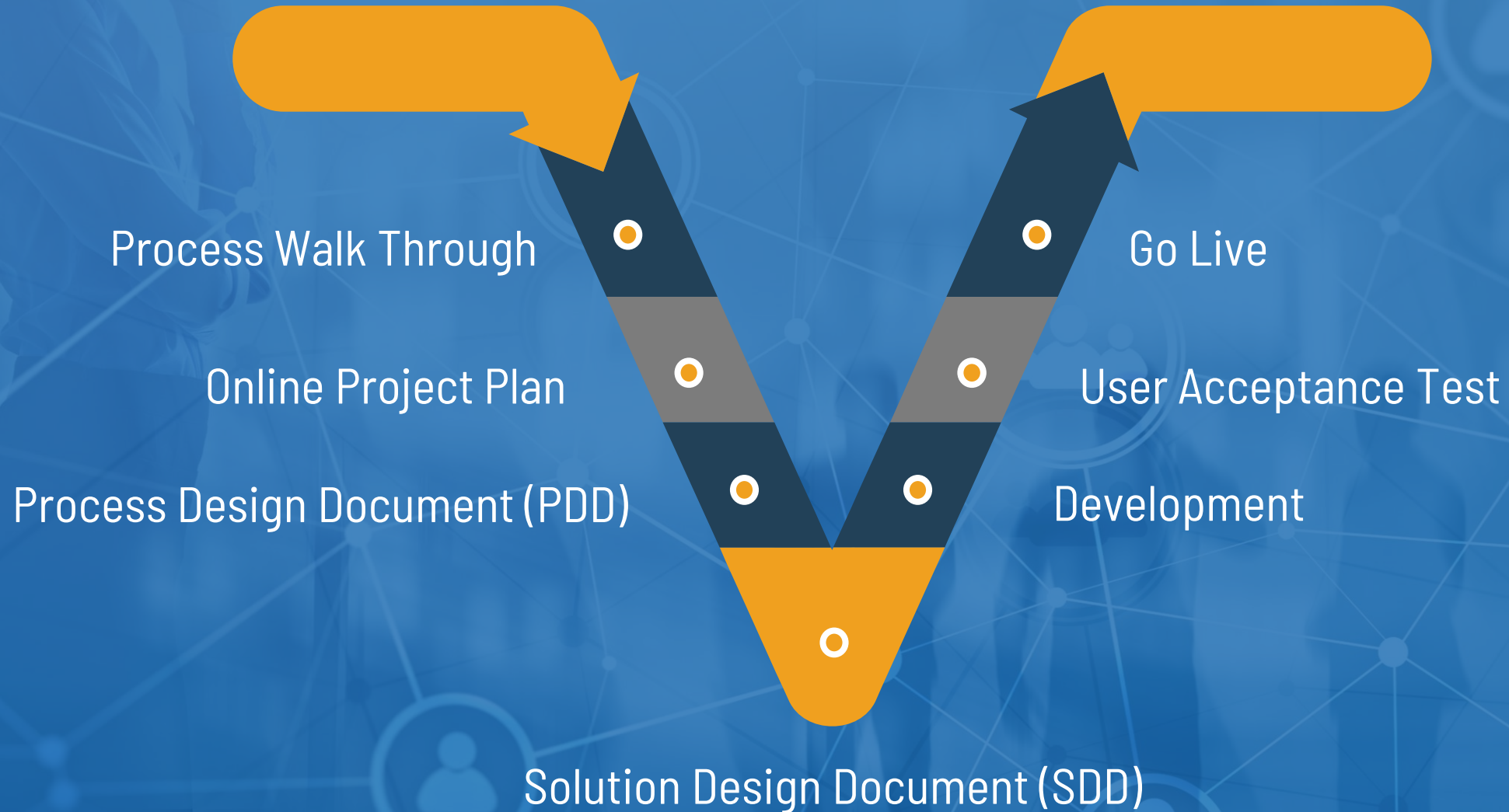
ENTERPRISE READY PRE-BUILT INTEGRATIONS

REASONS WORK WITH VALENTA

We bring together comprehensive E2E domain know-how and service experience

We focus on re-imagining business processes and delivering outcomes

We help our clients realize value @ speed with Managed Service Plans (Valenta Packaged workflows)

We provide our clients access to our best-in-class global innovation ecosystem

What is Digital Transformation?

- Robotic Process Automation
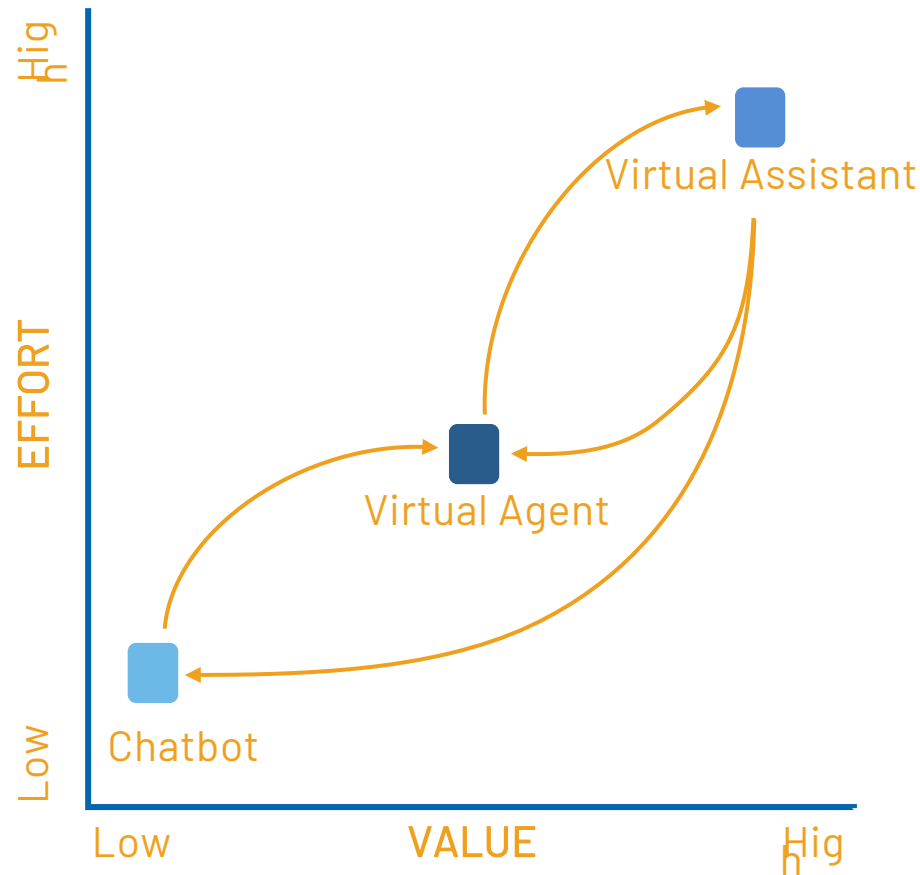- Conversational AI
- Cognitive AI

We Believe:
- In implementing Automation
- In increasing productivity and Profitability

The tools to create Chatbots can't create Virtual Agents or Assistants ...
Future Proof your decision by deploying a Conversational AI Platform

Chatbot

- Reactive
- FAQs (Single turn or rules based)
- Domain Specific
- Limited channels (usually 1)

Virtual Agent

- Reactive
- FAQs (multi-turn, adaptive)
- Task completion
- Multiple domains
- Multiple channels (in isolation)

Virtual Assistant

- Proactive and reactive
- FAQs (multi-turn, adaptive, predictive)
- Task completion
- Multiple domains with orchestration
- Omnichannel (shared sessions/ context)
- Adaptive Uis
- Data-driven decisioning

VALENTA RPA USE CASES

Finance & Accounting

- **Accounts Payables (P2P / S2P)**
  - Invoice Processing
  - Payments
  - Vendor Query Helpdesk
- **Accounts Receivables (O2C / B2C)**
  - Billing Process
  - Collections
  - Order Fulfillment
- **Record to Report (R2R)**
  - Bank Reconciliation
  - Journal Entries
  - Consolidating & Generating Reports

Information Technology

- Server & Application Monitoring
- File & Document Management
- FTP Download, Upload and Backup
- User Setup and Configurations

- Application Integrations
- Data and Content Aggregation and Migration
- ERP and other Systems Integrators
- Batch Processing
- Synchronizing, Deleting and Emptying File Folders

Cross Functions

- Data Entry
- Forms Processing
- Vendor Onboarding
- Analytics, Reporting & Dashboarding

Human Resources

- Employment History & Verification
- Employee Onboarding & Offboarding
- Payroll Time & Attendance Management
- Employee Data Management
- Tax Management
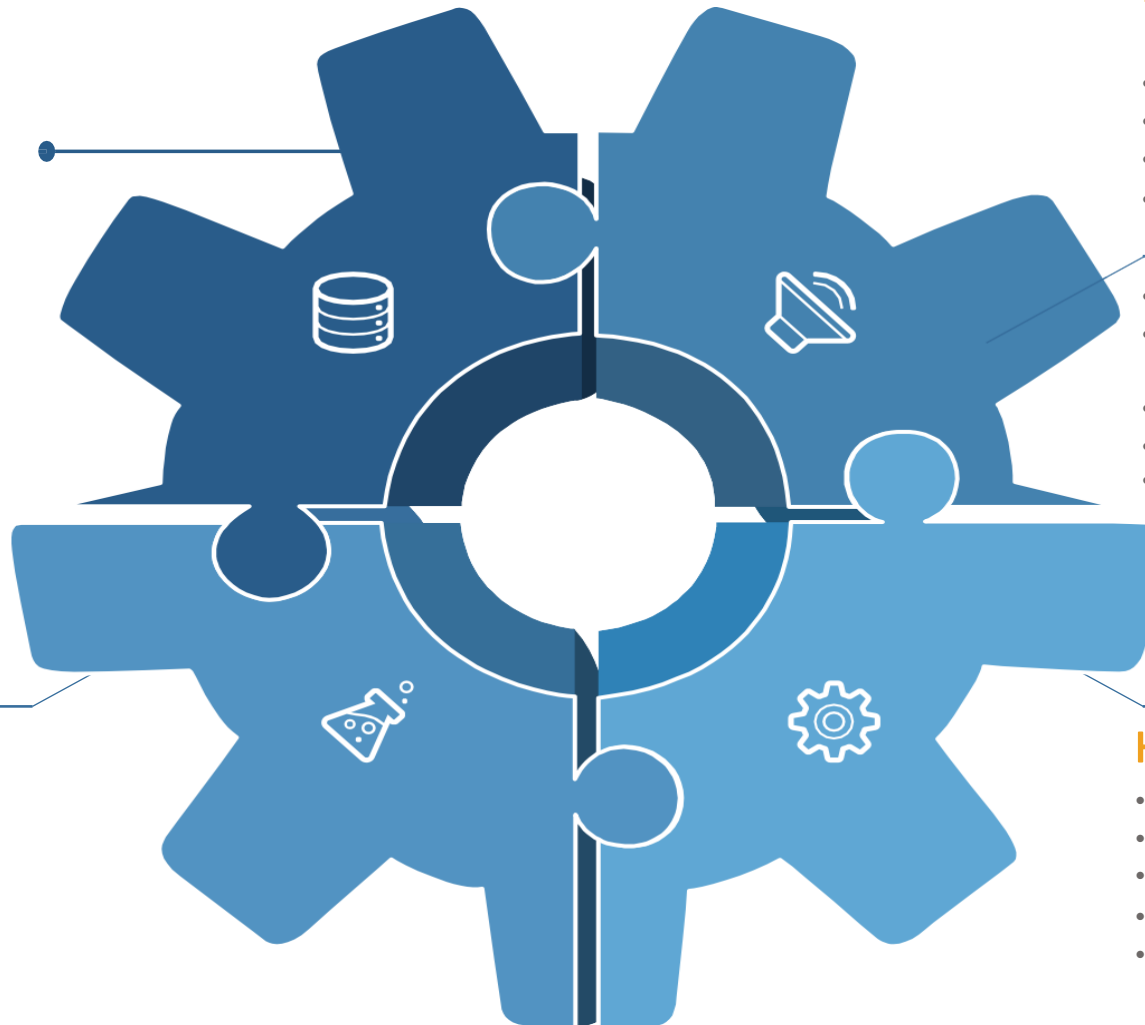
SAMPLE CASE STUDY: ACCOUNTING FIRM

CLIENT	SCOPE OF WORK	BENEFITS

CLIENT

Group of companies operating in GTA within the Finance and Accounting domain providing Bookkeeping Services to multiple small businesses in various stream.

Key business challenges:

- Absence of timely action insight to stay on track meeting various deadlines

- Monotonous, mundane tasks leading to re-work & underutilization of available resources

- Absence of timely entry of financial data in the system thereby indulging in duplication

- Highly people dependent processes limiting timely acquisition of new customers and in-turn growth of firm

- Cumbersome training leading to inconsistent practice – Standardization of work processes

- All factors leading to dis-satisfaction within employees.

- Employee engagement

- Employee retention

SCOPE OF WORK

- Process documentation to standardize work elements

- Define and measure KPI's

- Assisted in the Shortlisting and Finalization of a mundane processes suitable for automation

- Create process design documents, system design document for Bookkeeping functions

- Development of Robotic Process Automation tools for Bookkeeping, Accounts payable and Accounts receivables tasks

- Successful Deployment of RPA tools Automating listed tasks

- Automating tracking of Sales (invoices) and Purchases (bills)

- Identify and suggestion of MIS for senior management review and follow up

BENEFITS

- Business able to create capacity for new clients acquisition with same resources and space

- Standardized process flows and execution across key operations maximizing the use of system for information capture

- Reduced manual intervention and redundancy across key operations

- Optimal use of people, process and technology that will garner efficiency in operations

- Ready reference available for training of workforce

- Institute robust monitoring and reporting mechanisms with focus on qualitative and quantitative outcomes

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

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 organization 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.

Area 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

AISHWARYA RAVINDRAN
Business Process Consultant & Sr. Project Manager

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.

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

GAUTAM SAMATANI

Business Process Consultant & Sr. Project Manager

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I look forward to hearing from you!