
CAMASAN

Vital tools and services to help you
sustain and grow your business

May 2025

"Increase digital transformation success by using a structured approach to strategizing, evaluating and choosing new technologies."

Key Components of Digital Transformation Success

Executive Sponsorship

Business
Commitment

Managing
Complexity

Milestone
Achievement

Resource
Capability

Program and Project Management

Key Components of Digital Transformation Success

Executive Sponsorship

Business Commitment

- Prioritization
- Funding
- Resource Availability
- Managing Change
- Stakeholders

Managing Complexity

- Scope of Work
- Customizations
- Organizational Change
- Process Change
- Internal Controls

Milestone Achievement

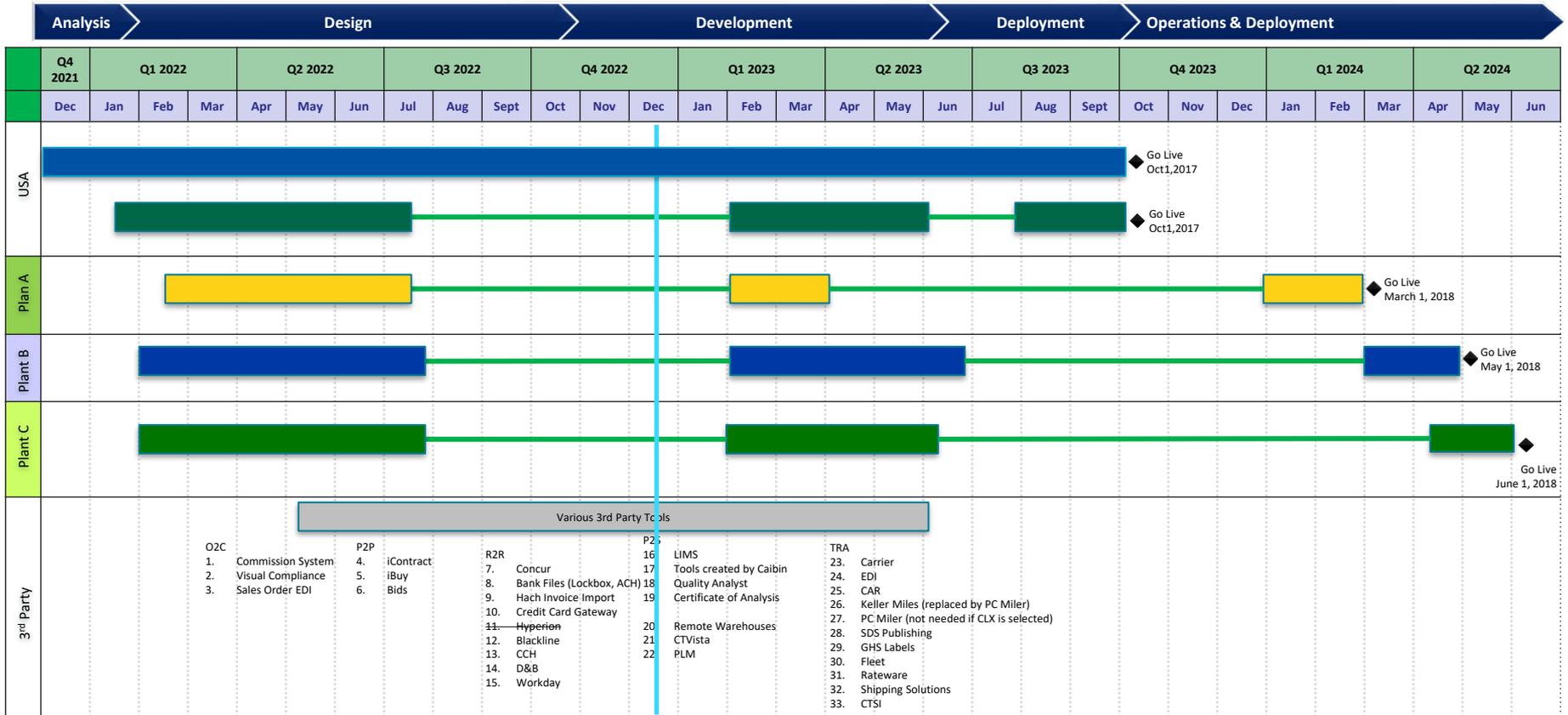
- Project Leadership
- Milestone Tracking
- Risk Management
- Issues Resolution
- Budget Tracking

Resource Capability

- Technical Know How
- Process Knowledge
- Business Experience
- Vendor Experience
- Communications

Program and Project Management

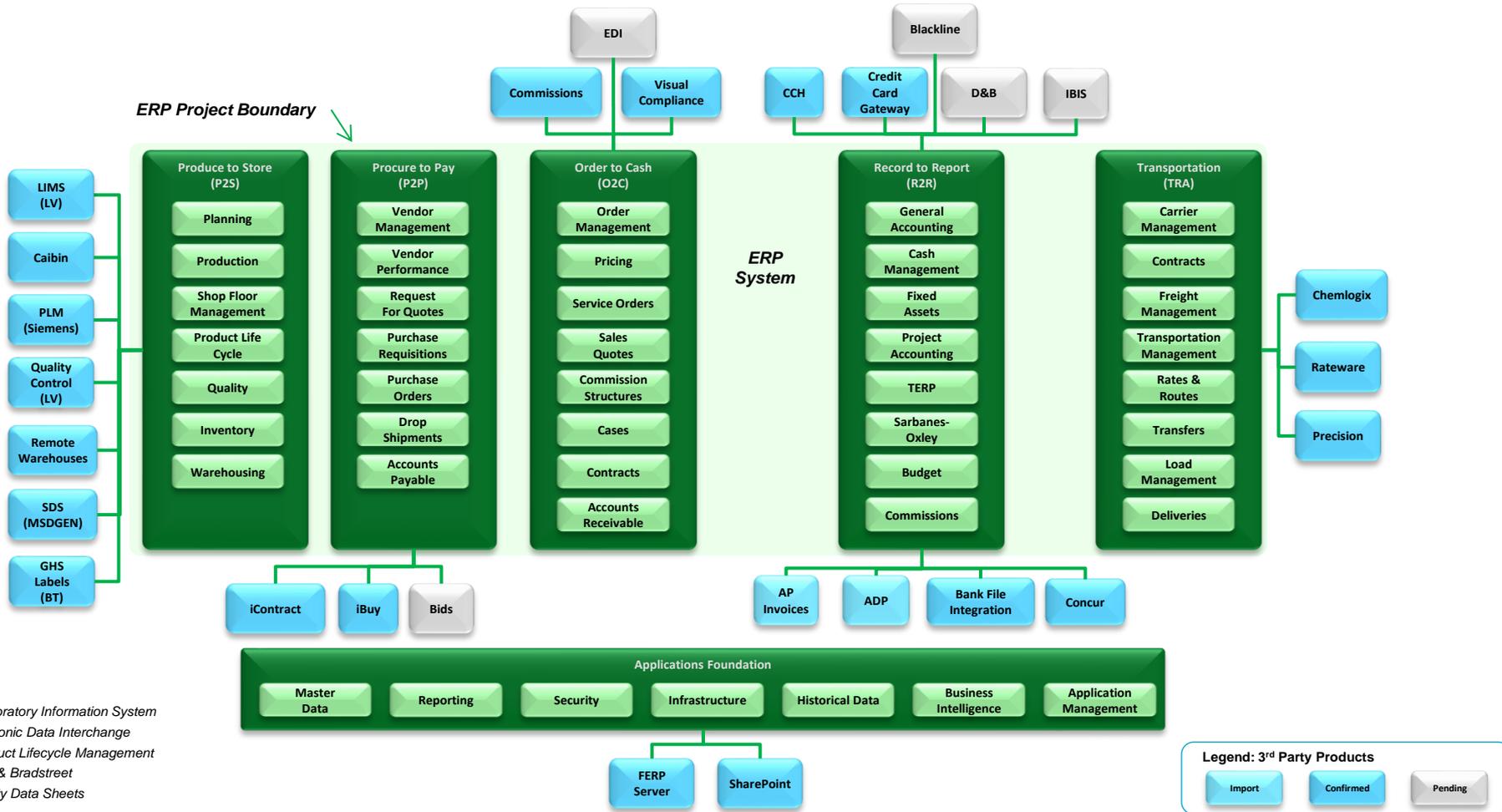
Roadmap - SAMPLE



* Timing not to scale

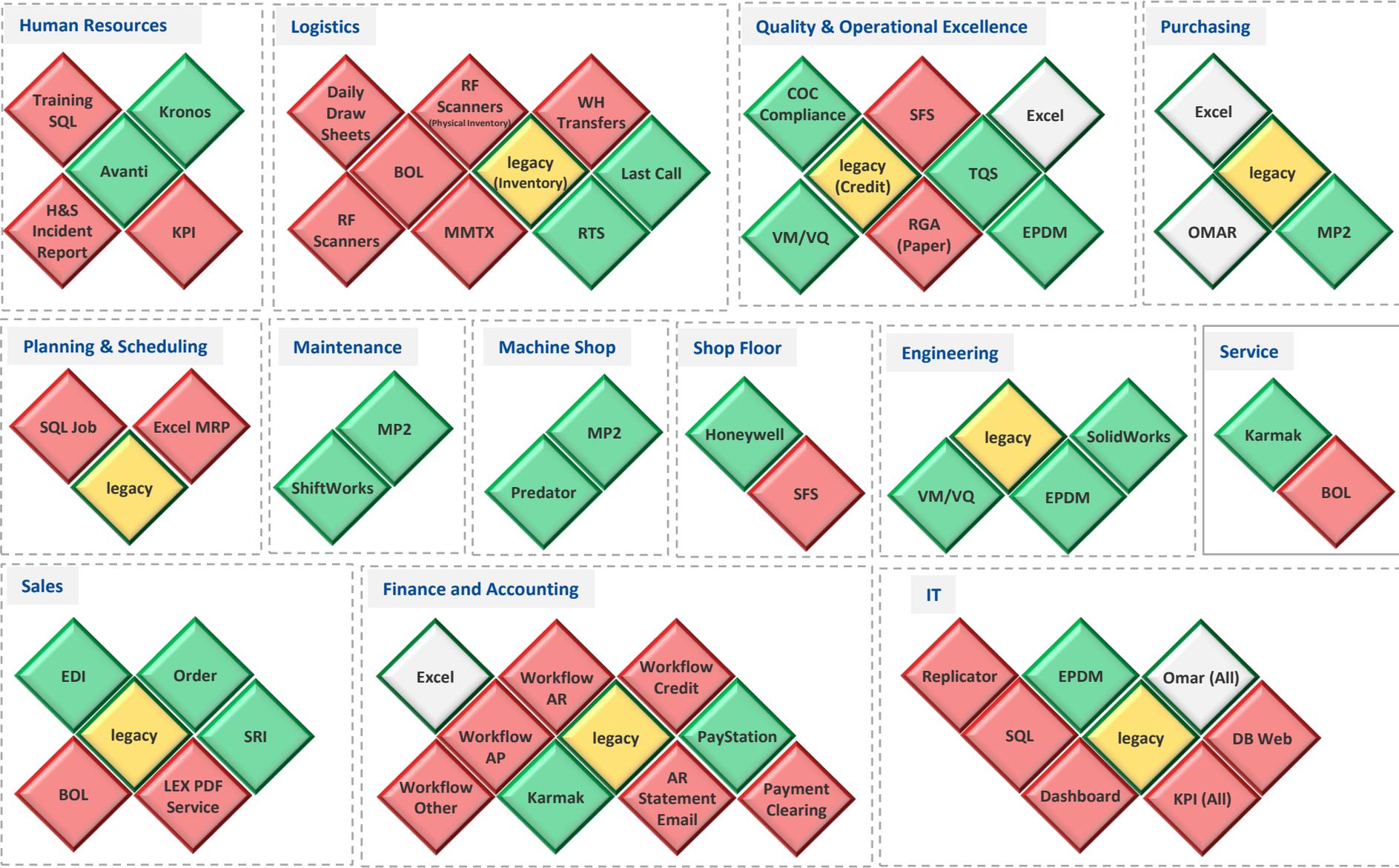
□ Peaks — Sustained Effort ◆ Milestones

Third Party Products – SAMPLE



LIMS: Laboratory Information System
 EDI: Electronic Data Interchange
 PLM: Product Lifecycle Management
 D&B: Dun & Bradstreet
 SDS: Safety Data Sheets

System Environment – Current - SAMPLE



LEGEND



Core System



Reporting System



Custom System



Specialty Third Party System 7

New Business: Digital Transformation Success - SAMPLE

- Current – Part 1
 - First impressions based on two weeks of observations
- Current – Part 2
 - Where are we now?
 - Where do we need to be?
 - What steps need to be taken?
 - What is needed from the SLT?

Category	Comments	Impression
Executive Sponsorship	Top down support present	
Business Engagement	Well represented business engagement. Increased communications needed	
Scope	Scope growing as Analysis and Design phases progress (i.e. transportation (CAR), full commissions, refining requirements)	
Timeline	Increase in scope pushing on the other project constraints – Time – Quality, Budget & Resources and Expectations impacted	
Budget & Resources	Increase in scope pushing on the other project constraints – Budget & Resources – Time, Quality and Expectations	
Business Impact	Impact medium to high. Flexibility, Visibility and Accuracy is a must have	

Business Case Methodology - SAMPLE



Business Case Methodology - SAMPLE

Business Situation

Stage 1

2 - 3 Weeks

Define Initiative

Stage 2

2 - 4 Weeks

Benefits & ROI

Stage 3

2 - 4 Weeks

Plan to Implement

Stage 4

2 - 3 Weeks

Business Situation Information Gathering

- Interviewed representatives from all departments
- Determined pain points and developed an understanding of the business situation
- Confirmed findings identified with the representatives from each department
- Summarized pain points to be addressed
- Created an initiative and strategy to address the identified pain points



Current State Assessment - Enterprise Applications



Business Situation Pain Points



Business Situation Overarching Business Risks

The declining value provided by legacy ERP System, used for customer order processing, manufacturing and financials has the following overarching business risks:

Overarching Business Risk	Risk Description	Overarching Business Risk	Risk Description
Business Risk	Using end of life systems with limited support leads to cost overruns, downtime and customer delays	Customer Service	Existing customer service and knowledge gaps which using legacy systems
Production Planning & Scheduling	Outdated production processes using old manual or outdated ERP systems, lack of real-time data integration, to reduce waste with demand	IT Internal Liability	Reduced ability of IT to mitigate risk associated with legacy ERP systems
Reducing the Footprint	Being forced to make a change to existing ERP systems, at a significant cost, due to the aging nature of legacy systems	Executive Support	Loss of executive support for legacy ERP systems, leading to a lack of resources for maintenance and upgrades

Business Goals Supported by IT Strategy

No.	Business Goal	IT Strategy to Support Business Goal
1	Improve customer service	Provide an adaptive and integrated ERP system that enables the sales team with the tools needed to support customers
2	Increase sales revenue	Deploy a Customer Relationship Management (CRM) software to increase the sales effort and sales
3	Reduce and/or lower profit margins	Improve customer order and product delivery times and cost management, customer, shipping, customer or state related effort using additional resources and IT strategy through
4	Increase process efficiency and maximize capabilities	Enable sharing of information across departments to gain insights. The information can be used to share the best practice solutions for the business and customers
5	Deliver financial performance	Control financial reporting and enable finance processes that reduce financial reporting and automatically generate reports to reduce manual reporting



Strategies Considered

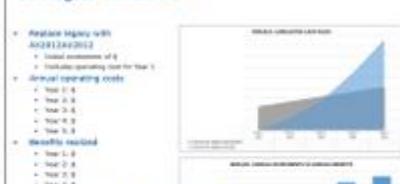


Proposed Initiative Risk Analysis

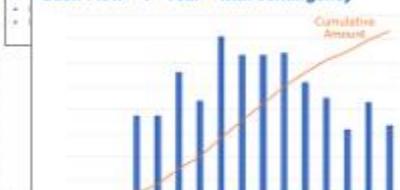
ERP initiatives are risky. Top risks that need mitigating to ensure a successful outcome:

Risk	Identifying Initiative Risk	Mitigation Strategy
Organizational Change	Organizational change is a major risk in ERP implementation. It is often the most difficult part of the project. It involves changes in roles, responsibilities, and processes.	Clear communication and training are essential to ensure a smooth transition. Management support is crucial for success.
Budget and Skills	Budget and skills are critical factors in ERP implementation. A lack of budget or skilled personnel can lead to project failure.	Thorough budgeting and resource allocation are necessary. Investing in training and development can improve skills.
Business Process Integration	Business process integration is a complex task that requires a deep understanding of the organization's current processes and how they will be affected by the new system.	Conducting a thorough process analysis and involving key stakeholders in the design process can help ensure a successful integration.
Vendor	Vendor selection is a critical decision that can significantly impact the success of the project. It is important to choose a vendor with a proven track record and strong customer support.	Conducting a thorough vendor selection process, including requests for proposals (RFPs) and site visits, can help identify the best vendor for the project.
Scope Creep and Uncontrolled Changes	Scope creep and uncontrolled changes are common risks in ERP implementation. They can lead to budget overruns and project delays.	Establishing a clear scope of work and a change management process can help prevent scope creep and control changes.
Management Support	Management support is essential for the success of any ERP implementation. It involves providing resources, training, and encouragement to the project team.	Regular communication and reporting to management can help ensure they remain engaged and supportive of the project.
Resource and Skill Availability	Resource and skill availability are critical factors in ERP implementation. A lack of resources or skilled personnel can lead to project failure.	Thorough resource planning and training are necessary to ensure that the project team has the skills and resources needed for success.
Project Management	Project management is a critical factor in the success of any ERP implementation. It involves planning, organizing, and controlling the project resources to achieve the project objectives.	Establishing a clear project management structure and process, including regular communication and reporting, can help ensure a successful outcome.

Strategies Considered



Strategies Considered Cash Flow - 1st Year - with contingency



Our Recommendation

Adopt Leapfrog Strategy and implement AX2012 in year 1 to support business objectives and use it as a springboard to support its future ERP vision

Implications if not implemented	Opportunities if implemented
Continued inefficiencies in the organization due to full capacity, manual data entry, duplication, errors, business process friction and exposure of customer information.	Provide personalized and integrated solutions, sharing information across departments to enhance customer skills and build the technology.
Customer service declines due to missed deadlines, delays in production, defect in shipments, double inventory allocation, long lead times and customer training issues.	Improve customer service leading to customer retention and sales revenue growth. Increased outputs in production without the need to add administrative staff.
Time needed gathering data, errors, including historical data for trends and opportunities for improvement, large customer data and storage.	Enhance and management empowered to make decisions and adjustments based on consistent, accurate and timely data.

Critical Success Factors

- Executive sponsorship**
 - The client support provided
- Business engagement**
 - Executive engagement support
 - Strategic engagement through implementation
- Adequate funding**
 - Use of accurate relative budget forecast
 - Regularly review relative cash flow needs
 - Monitor budget consumption versus relative deliverables
- Scope control**
 - Set scope for the objectives of the initiative to address the main pain points, avoid scope creep
 - Monitor features
 - Set employee expectations
- Reasonable timelines**
 - Align timelines to scope, skills and resource availability
- Project Management**
 - Use standard practices of project management, leadership and communication
 - Keep executives, management and employees abreast of progress, risks and challenges





Thank You!

Do you have any questions?

Contact:

csanchez@camasan.com

www.camasan.com

CREDITS: Image by royalty free Getty Images