



**Objectives**

- As-Is Assessment:**
  - Formalize a detailed facts based assessment of existing business processes
- To-Be Design:**
  - Translate vision into preliminary design of future business processes – validate with stakeholders
- Detailed Design:**
  - Refine and expand blueprint for future business processes
- Implementation Planning:**
  - Develop practical work plans and associated accountabilities to implement envisioned changes
- Implementation:**
  - Execute operational changes in phased rollout
  - Capture value outlined in business case

**Key Activities**

- As-Is Assessment:**
  - Baseline/collect data for existing operations:
    - Cost
    - Headcount
    - Transaction Volume
    - Service Levels
    - Systems
  - Identify and evaluate inconsistencies among area:
    - Process Flows
    - Job Design
  - Enhance business process maps, by area
- To-Be Design:**
  - Isolate opportunities to consolidate, simplify operations, improve controls, and gain scale economies
  - Modify existing functional designs, including:
    - Standard processes
    - Standard jobs
  - Refine high-level business case
  - Validate technology readiness:
    - Business Systems
  - Validate To-Be design with key stakeholders
- Detailed Design:**
  - Refine and expand detailed design, tailor to operations including:
    - Process flows linked to systems
    - Business systems linked to processes
    - Job design linked to skills
  - Project P&L for the business post-implementation
  - Identify communication requirements and create communication plan
  - Begin negotiating service level agreements (SLAs)
- Implementation Planning:**
  - Compare existing state to future detailed design to understand change requirements
  - Develop change strategy and roll-out plan
    - Select and prioritize business process roll-out
  - Identify timing and prioritization of implementing business processes
    - Evaluate resource capacity
  - Develop detailed implementation plan with clear accountability for all major milestones
- Implementation:**
  - Implement people, process and technology changes required to realize transformed business model
  - Charter discrete projects that collectively deliver needed change
  - Establish project management structure to track progress against milestones and dependencies
  - Enroll staff in change efforts through communication and training

**Timeline**

