



**The Road to
Improved Performance
Starts Here**

ENTERING BPM: FROM CONCEPT TO REALITY

BPM Partners helps organizations take Business Performance Management (BPM) from exciting concept to successful reality. We do this by providing a suite of low-cost, fixed-price services. These services are designed to reduce your risks — including technology, compliance, and financial risks — and accelerate the time to payback. The service selection table below can help identify the offering that best meets your needs.

FIND YOUR SITUATION

Just starting: trying to determine what BPM components are needed and convince management to proceed with the project.

Ready to buy: looking for vendors that meet your requirements while trying to cut through the marketing buzzwords and see past the slick demos.

Implementing: the product is purchased and now comes the biggest challenge: an on-time, on-budget implementation that delivers on the promise of BPM and is accepted by end users.

Tuning: the system is up and running but doesn't have all the capabilities originally envisioned and the performance is not where it needs to be. (Not applicable for clients of our selection and implementation services.)

FIND YOUR SOLUTION

Needs Assessment and ROI Analysis: helps you precisely define your requirements and estimate the economic benefit.

Vendor Evaluation and Selection: using our in-depth research database of 100+ vendors we prepare a shortlist of the ones that really match your needs and then put them through their paces to find the best fit.

Project Management, Implementation, and Education: utilizing our AIM for Success (Analyze, Implement, Measure) methodology, developed over twenty years and thousands of implementations, we squeeze the risk out of the equation, keep costs down, and achieve BPM success.

System Review and Optimization: seasoned application experts examine your system and suggest design improvements while technical consultants optimize the database and operating environment for maximum performance.

BPM PARTNERS: SERVICES TARGETED TO REAL BUSINESS CHALLENGES

Budgeting/Planning: Is your current budgeting process painful and ineffective?

Solutions for: Budgeting, Strategic Planning, Forecasting

Consolidation/Reporting: Do users still lack easy access to one set of consistent and accurate data?

Solutions for: Consolidation, Financial Reporting, IFRS Transition

Dashboards/Scorecards: Are groups across the company out of alignment with your strategic goals?

Solutions for: Performance Dashboards, Scorecards and KPIs

Operational Optimization: Has the current economy made improving efficiency in all areas a priority?

Solutions for: Operational Analysis, Profitability Optimization

WHY DO COMPANIES ENGAGE BPM PARTNERS?



SAVE TIME *“BPM Partners skillfully guided our discussions regarding our business requirements and their knowledge of the space was invaluable, saving us a great deal of time.”*

— Joanne Diaz, Senior Director, Financial Reporting, Sykes Enterprises, Inc.



SAVE MONEY *“BPM Partners did a good job guiding us through the process of validating and defining requirements, developing our business case, and evaluating appropriate vendors. They also helped us prepare for our software license and implementation service negotiations with the vendor we selected. We found them to be a good value for the money and provided us with a cost-effective approach that greatly assisted our project.”*

— George Brinegar, Director, Financial Planning and Budgets, OCLC



REDUCE RISK *“Working in partnership with BPM Partners’ experts we were able to ensure that we developed a thorough understanding of end-users needs and expectations, allowing us to build buy-in at an early stage and undertake a more efficient vendor selection and implementation process, thereby reducing risks for the project.”*

— Alan Clint, Corporate Performance Manager, Compagnie Générale de Géophysique Services

GET OFF TO THE RIGHT START

Hurrying any of these stages, or skipping the related tasks shown in this project diagram, will create unnecessary risks that could significantly hinder a satisfactory outcome.



Virtually every performance management project progresses through three distinct stages.

- **Project Definition & Justification**
- **Technology Evaluation & Selection**
- **Deployment**

“Where do we want to go?”

ENSURE A SUCCESSFUL PROJECT DEFINITION & JUSTIFICATION

It is important to address the Requirements Definition and prepare for vendor selection from three perspectives:

- Familiarity with your company and systems;
- Experience with how companies like yours can maximize the payoff from implementing performance management systems throughout the enterprise;
- Up-to-date detailed knowledge of many software vendors and their solutions.

BPM PARTNERS’ access to vendors, and detailed knowledge of the solutions they offer, helps gear the questions asked in the Requirements Definition phase to real-world options and functionality that are available within your budget.



GETTING STARTED: RISKS & RISK REDUCTION

<u>RISKS</u>	<u>BPM PARTNERS’ SOLUTIONS</u>
Inaccurate project budget	Start-to-finish “Master Plan” experience
Conflicts: project owner vs. stakeholder, Finance vs. IT	Objectivity, and familiarity with both perspectives
Overlook potential benefits of BPM	BPM PARTNERS’ Roadmap
Omit key field requirements	BPM PARTNERS’ End-user Surveys
Overlook available software solutions	Knowledge of vendors and solutions
Scope creep	Knowledge of cost / feature tradeoffs
Stray from strategic goals	Experience with typical divergence points where strategic focus is lost
Underestimate system conversion / integration issues	BPM PARTNERS’ System Assessment

A SMOOTH START WITH TECHNOLOGY EVALUATION & SELECTION



Clients find considerable value in our ability to pinpoint the ideal breadth and depth of the overall project, with the goal of achieving the best ROI and meeting the strategic goals that they have established.

When it comes to details, we assist in defining the metrics that will be most useful to your management team. A large number of vendors, including some traditional ERP suppliers, already claim industry leadership roles in the relatively new field of business performance management. As a result, many of them make similar statements about their software functionality and architectural compatibility.

Evaluation is time-consuming and difficult. BPM PARTNERS has the vendor access and has done the research needed to slice through the hype and properly judge vendors, software, and service capabilities.

“How will we get there?”

In selecting the right vendor and system, objectivity and vendor independence are important. The solution is BPM PARTNERS’ **VENDOR SELECTION VALUE PACK™**, a fixed-cost package that adds a BPM expert to your team. We provide all you need to properly evaluate and identify the best performance management solution for your specific requirements. When you purchase the **VENDOR SELECTION VALUE PACK™**, BPM PARTNERS will:

- Review and clarify your requirements to enable a razor-sharp view of your unique needs, usually starting with our BPM Self-Assessment Audit Tool.
- Work with your team and, if needed, create an RFP that asks the right questions at the appropriate level of detail.
- Develop your short list of two to three vendors that closely match your requirements, drawing on BPM PARTNERS’ extensive knowledge base.
- Educate vendors about your specific needs, so they can customize demonstrations for your business.
- Question vendors to ensure you have sufficient real-world detail and “under-the-hood” knowledge.

- Oversee construction of a prototype, if required.
- Evaluate and score RFP responses and demos.
- Recommend the vendor and software that best meet your functional, budget and timeframe requirements.

With BPM PARTNERS’ negotiation guidance, you can be sure of only buying the seats and modules that you need, at the best available terms.

FROM A MAJOR PLAYER IN THE GLOBAL
AEROSPACE INDUSTRY:

“Ultimately we got more than we expected and the benefit we received from your services greatly outweighed the cost. BPM PARTNERS proved invaluable in getting our project on track, moving in the right direction, and completed.”

Jim Adamson
Manager Budget & Forecast
Dassault Falcon Jet



TECHNOLOGY EVALUATION & SELECTION

“How will we get there?”

VENDOR SELECTION: RISKS & RISK REDUCTION

RISKS

BPM PARTNERS' SOLUTIONS

Choosing the wrong solution	Rigorous evaluation and scoring process
Insufficient “under-the-hood” detail	BPM PARTNERS' vendor background enables us to ask the necessary probing questions
Vendor overstates functionality	Our knowledge of software's limitations
Time wasted viewing slick, packaged demos	Arrange customized demonstrations
Receiving useless RFP responses	Experience in constructing detailed, focused RFPs
Architectural incompatibility	Technical Review combined with current System Assessment
Selecting the vendor with the best marketing	Knowledge base of all BPM vendors' offerings
Choosing wrong implementation partners.....	Strong network of proven, focused BPM implementation resources
Overpaying	Ensuring you buy only what you require; from the most cost-effective vendor
Difficulty justifying selected solution to management	Thorough documentation of the selection process



DEPLOYMENT SERVICES

“What will ensure success?”

Performance management projects have significant visibility and impact upon the enterprise. Because their dollar cost is typically less than that of most ERP projects, it is easy to underestimate their complexity. In our experience, performance management typically requires the implementation of multiple applications such as portals, planning, financial consolidation, and dashboard development. These applications often overlap. A range of IT sub-projects are involved, from database and technology infrastructure setup, to source data cleansing and loading, and finally performance tuning. There are often multiple products/modules from one or more vendors to learn about, implement, and integrate. External implementation experts—vendor or other third-party—may also need to be integrated into the team.

All these activities and personnel need to be coordinated in advance with a unified framework, while adhering to a tight schedule and budget, and keeping up communications with your stakeholders.

Fulfilling Strategic Goals

BPM PARTNERS has found that relying on a traditional technical project manager to address all these challenges can result in performance management projects going astray. With the investment required for performance management systems, mistakes can be costly and company exposure can be significant. It makes good business sense to tap into outside expertise, thereby

reducing risks considerably. We bring considerable experience and skill to the task of ensuring that an enterprise-wide, organizationally-deep performance management project achieves rapid user acceptance and adheres to the original strategic intent and need.

IMPLEMENTATION: RISKS & RISK REDUCTION

RISKS

BPM PARTNERS' SOLUTIONS

Overtask a traditional IT project manager.....	Add enterprise-broad layer of planning & communication
Technical pitfalls	Experience with BPM project obstacles, ability to anticipate and provide solutions
Missed deadlines	Master plan with critical path and backup plan, supported by status reports
Over budget	Tight team coordination & management
Insufficient user acceptance	Participation, surveys, and education
Failure to meet strategic goals	Unrelenting focus on strategic objectives and business drivers



DEPLOYMENT SERVICES

AN OUTSIDE PERSPECTIVE ON INTERNAL COMMUNICATION

To build understanding of the benefits of a new performance management system, BPM PARTNERS arranges separate demos targeted to relevant IT staff, executive level stakeholders, and intended users. This exposure results in greater willingness throughout the company to invest the necessary time and effort to implement successfully. By extending this educational effort to field locations, and including them in the testing of the system, BPM PARTNERS helps ensure that rollout is not only successful, but meets an enthusiastic and motivated reception.

A valuable layer of overall management and guidance is added to your project by BPM PARTNERS' professionals. Specifically, they apply their:

- Unbiased third-party perspective, independent of vendors, line managers and the IT department
- Experience in communicating with all stakeholders and resolving business, territorial, and technical issues
- Experience from the client, service provider and technology vendor perspectives
- Knowledge gained from focusing day-in, day-out on deployment of performance management systems

EFFECTIVE ENGAGEMENT MANAGEMENT

BPM PARTNERS will work with your leadership to guide the project successfully from start to finish — and provide feedback along the way. To begin, an overall project plan brings together all the necessary pieces. Our experts architect the functional solution to meet your business requirements, then oversee all subprojects and coordination. With weekly deliverables, ongoing status reports to your stakeholders, our objective third-party stance to help referee conflicting needs or agendas, BPM PARTNERS helps you deliver the successful performance management solution on time and within budget. Our services are offered in packages of varying sizes, which keeps your costs predictable and reasonable.

BPM PARTNERS' SOLUTIONS: ELIMINATE BPM INVESTMENT & TIMELINE RISKS

FROM THE WORLDWIDE INNOVATOR IN
MAGNESIUM DIE CASTING TECHNOLOGIES:

"The guidance and assistance BPM PARTNERS provided helped us develop a negotiation strategy that secured pricing with the vendor that we would not have been able to obtain ourselves. This savings more than paid for BPM PARTNERS' services. Overall we are a very satisfied customer."

Troy Angst
Director, Financial Reporting and Analysis
Meridian Lightweight Technologies, Inc.



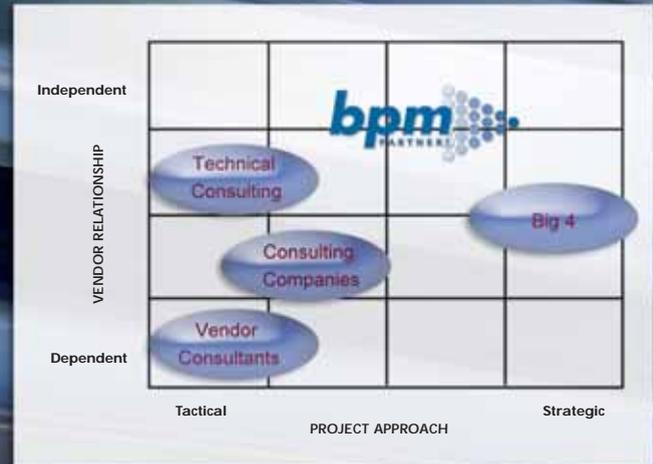
BPM PARTNERS' solutions help companies evaluate and implement performance management initiatives within established investment and staffing budgets to eliminate financial and operational risks associated with BPM deployments. BPM PARTNERS' services include comprehensive project planning, requirements assessment and definition, identification and evaluation of BPM solution vendors appropriate for your unique requirements, and management of all implementation services required to complete deployment of the selected BPM solution on time and on budget.

MAXIMUM BPM EXPERIENCE, OBJECTIVITY, AND KNOW-HOW

Performance management projects are highly visible because they involve both strategic and tactical issues, and mix together business and technical concerns. They typically span multiple departments or divisions, engage diverse sets of users and link with systems from three or more vendors.

Given this broad scope, it is advisable to support the IT project manager with outside expertise. Where do you turn for that assistance? Services to assist with implementation of performance management systems are proffered by general IT consulting firms, accounting-consulting firms such as the BIG 4, and vendors themselves.

BPM PARTNERS occupies a unique position by virtue of its independence, its role as an influencer in the industry, its combination of hands-on experience with seasoned strategic sense, and—importantly—its extensive knowledge of the different resources which may prove valuable to your BPM project.



BPM PARTNERS' ability to contain your project cost and risk stems from its objectivity and expertise in both strategy and tactics.

ADD A BPM EXPERT TO YOUR TEAM



BPM projects proceed most effectively when the right players are involved, each with a clear set of tasks that are geared to their knowledge, scope, and experience. For the project to be successful, all the players must be successful in their respective roles. BPM PARTNERS works alongside your team and stakeholders, enabling that success. The task breakout outlined on the following page illustrates a proven division of roles that has been cost-effective for FORTUNE 1000 companies.

THE CLIENT: A LIFE SCIENCE LEADER WITH CUTTING-EDGE TECHNOLOGIES FOR BIOSCIENCE RESEARCH AND BIOPHARMACEUTICAL MANUFACTURING. (NYSE: MIL)

"Without expert help from BPM PARTNERS we would have had difficulty arriving at the right vendor to suit our needs. We realized that we were making a 'once in a decade' choice - with the money and effort we were planning to invest, we could not afford a misstep."

Robert Tonsmeire
Vice President - Finance
Millipore



HOW BPM PARTNERS HELPS

Project Definition & Justification

"Where do we want to go?"

Education

BPM Master Class covers performance management basics, benchmarks and best practices to get your team up to speed and aligned to kick-off your BPM initiative.

Roadmap Workshop

Laying out the strategic framework for your BPM initiative, this workshop enables you to assess where you are, determine where you want to go and provide direction on how to get there in the form of a phased roadmap.

Business Case Development

Whether it is to justify funding, prioritize the project or just set corporate goals this service identifies returns and benefits that are specific to your company.

Requirements and/or KPI Development

Conduct discovery sessions and review with client team to summarize and prioritize overall business requirements while testing for feasibility and missed benefits. Review existing key performance indicators and propose others.

Technology Evaluation and Selection

"How will we get there?"

IT Assessment

Working together with your IT management, this assessment includes review of existing systems, data sources, hardware and other infrastructure requirements for BPM. Deliverable is a risk mitigation action plan.

Vendor Selection

Provides proven methodology, tools and expert vendor-neutral guidance to take you through requirements review, vendor fit analysis, RFPs, custom demos and vendor scoring to arrive at the ideal solution while reducing time to payback.

Guidance on Software Negotiations

BPM experts provide overview of expectations during the contract negotiation process. Includes guidelines on how to buy only what is needed to support target initiatives.

Implementation Partner Selection

Includes implementation expertise assessment, recommendations for contract and cultural fit with project team.

Deployment Strategies and Management

"What will ensure success?"

Functional Architecture

Maps client requirements to the selected technology. Oversees key design decisions to optimize performance, minimize maintenance and deliver on original goals..

Engagement Management

Objective business and technology BPM expert oversees master project plan, maintains communication with stakeholders on project progress, identifies critical path issues and keeps individual project managers aligned with business requirements.

Custom Education

Unlike generic product training, the focus of this end user education is your specific business use of the selected applications which greatly reduces the learning curve and increases the successful adoption of your new BPM solution.

Pilot testing and roadmap development

Provide methodology and best practices for pilot testing of a new BPM system. Includes development of a roadmap for successful deployment, including end user rollout guidance.

ABOUT **BPM PARTNERS**



BPM PARTNERS is a global organization headquartered in Stamford, Connecticut, with offices in the United Kingdom, Australia, Singapore and China. The firm was founded by Craig Schiff, a pioneer in Business Performance Management. His vision—and the firm's mission—is to assist organizations in realizing the potential of performance management. To this end, Schiff has assembled a team that combines deep expertise in BPM with extensive implementation experience—an average of fifteen years per individual. In addition, BPM PARTNERS has built the most extensive knowledge base on BPM software choices and functionality currently available. BPM PARTNERS was recognized for its unique value proposition through the Consulting Magazine Small Jewels Award.

Key personnel at BPM PARTNERS include former vendor-side executives with direct experience helping companies of all sizes select and deploy performance management solutions. Many of our associates also have considerable experience in medium to large enterprises, where they gained a valuable end-user perspective. They blend their depth of understanding of technology with a process-oriented approach to address critical business issues. In total, our team has been responsible for thousands of successful BPM implementations and a roughly equal number of software evaluations, including many in the FORTUNE 500 as well as midrange companies. BPM PARTNERS' experts include the co-founder of a software firm whose technology is the underpinning of one of the major BPM platforms on the market today, a regional manager of implementation services of one of the leading software vendors on the market, and a marketing expert who has been involved with the launch of several products in this category.

BPM PARTNERS GLOBAL HEADQUARTERS

BPM Partners, Inc.
Six Landmark Square
Stamford, CT 06901
USA

Phone: (203) 359-5677

Fax: (203) 359-5877

Email: info@bpmpartners.com

Site: www.bpmpartners.com



LONDON • MELBOURNE • NEW YORK • SINGAPORE • SHANGHAI