

**To Conquer a  
Business Performance  
Management Project...**

**...You Need the Support of  
a Strong Organization  
with Deep Expertise.**



From a bewildering array of competing software suppliers

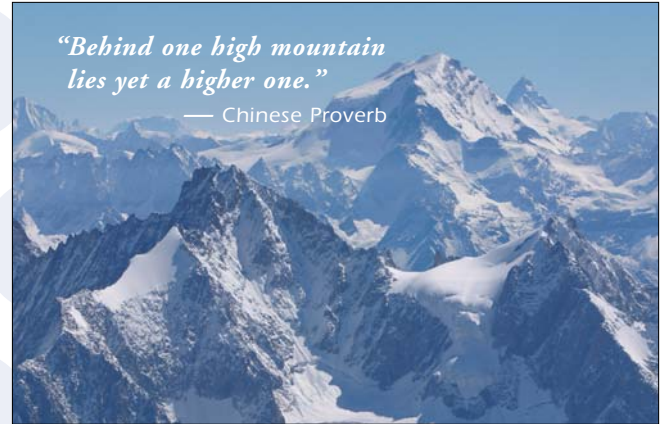
## **HOW WILL YOU CHOOSE THE OPTIMAL BPM SOLUTION?**

With multiple sub-projects, diverse sets of users, and high-level stake holders

## **HOW DO YOU KEEP THE PROJECT ON TRACK AND MEET ALL EXPECTATIONS?**

Confronted with varied viewpoints and needs from Finance, IT, Marketing, and Sales

## **HOW DO YOU DETERMINE THE BEST METRICS FOR YOUR INDUSTRY AND YOUR COMPANY?**



## **MAXIMIZE BUSINESS PERFORMANCE.**

Requirements to Results. Without the Risk.

## **ASK BPM PARTNERS.**

We helped create the industry. Now our sole focus is guiding companies from start-to-finish in realizing the benefits of BPM.

## **GUARANTEED SUCCESS.**

Unbiased expertise for a fixed price from the authority on Business Performance Management

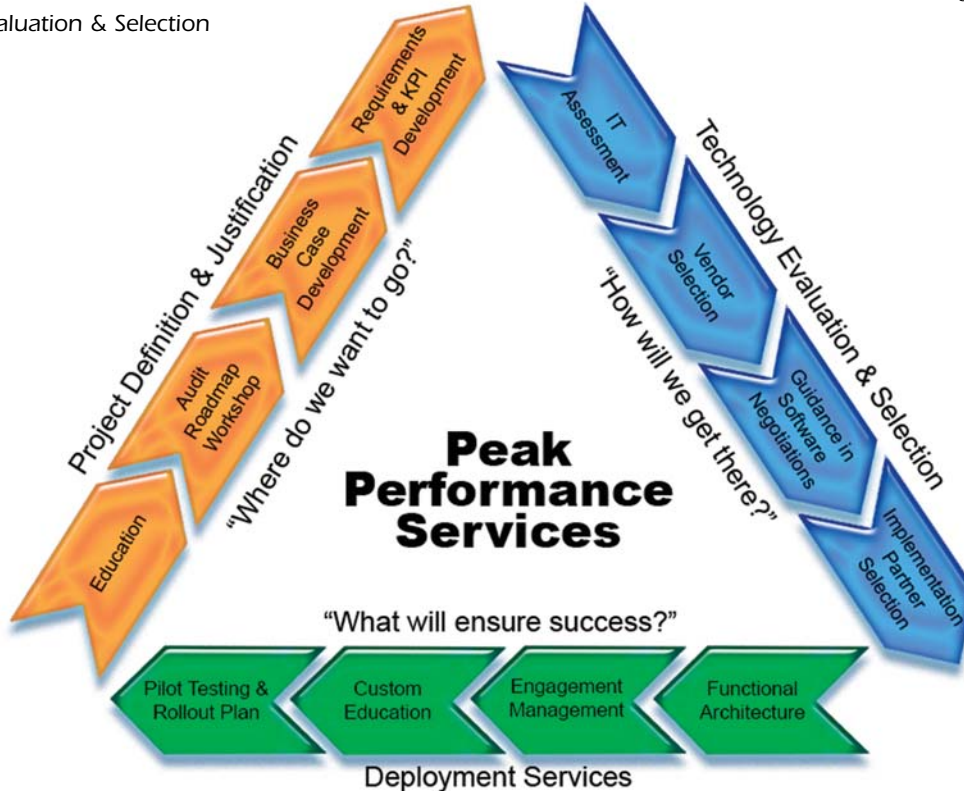


# GET OFF TO THE RIGHT START.

Virtually every performance management project progresses through three distinct stages.

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

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.



# ENSURE A SUCCESSFUL PROJECT DEFINITION & JUSTIFICATION

“Where do we want to go?”

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

## MAKE THE RIGHT CHOICES DURING REQUIREMENTS DEFINITION



*A major mining company, undertaking a BPM implementation, needed to decide how many field and division managers would be provided with new metrics. A senior resource from BPM PARTNERS helped to balance the desire to reach more users against realistic costs, and to control other “scope creep” issues during definition of requirements. The consultant was also able to help arbitrate and amicably resolve cost and functionality arguments that had pitted Finance against IT.*

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

### RISKS

### BPM PARTNERS’ SOLUTIONS

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’ Audit Tools
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 Audit





# A SMOOTH START WITH **TECHNOLOGY EVALUATION & SELECTION**

“How will we get there?”

Clients find valuable 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 you 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.

FROM THE LARGEST MAKER OF BRANDED  
FROZEN-FOODS IN AMERICA:

*“BPM PARTNERS’ objectivity, analysis capabilities and ability to quickly grasp our business helped ensure we made an informed vendor decision based on our unique business requirements.”*

Scott May  
Assistant Controller  
Schwan Food Company



THE SCHWAN FOOD COMPANY™



## ROBUST SELECTION PROCESS & FULL BUY-IN

*BPM PARTNERS helped a FORTUNE 500 manufacturer establish a short list of six software suppliers. After assisting in preparation of the RFP, we orchestrated the scoring of vendor responses, then arranged customized demonstrations to prove needed functionality. The thorough, presentation-ready documentation, and the participatory nature of the vendor selection that BPM PARTNERS provided led directly to solid, unanimous buy-in from the stakeholders.*

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.

# TECHNOLOGY EVALUATION & SELECTION

“How will we get there?”

- 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.



# 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 Audit
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, and 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 back-up 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

“What will ensure success?”

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.

### 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.*



# UNBIASED VENDOR KNOWLEDGE

## UPDATE

VENDOR LANDSCAPE AS OF OCTOBER, 2007

BPM PARTNERS stays current with the evolving vendor landscape, assuring your requirements are met with technology that best addresses your key business issues.

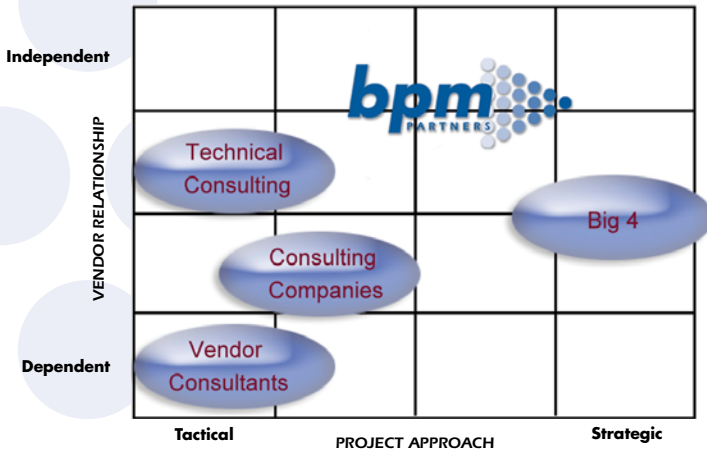


# MAXIMUM BPM EXPERIENCE, OBJECTIVITY, AND KNOW-HOW

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.**



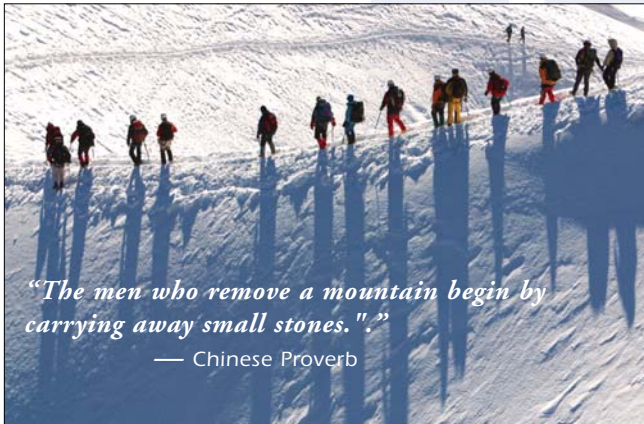
# ADD A BPM EXPERT TO YOUR TEAM

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 MULTINATIONAL INSURER, ONE OF THE LARGEST SPECIALTY INSURANCE GROUPS IN THE US. (NYSE: HCC)

*"BPM PARTNERS' provided structured processes, tools, contacts, expertise and insight into the vendors that we didn't have in house. Their guidance and processes were tremendously valuable in achieving a decision that all of our key stakeholders could own."*

Mark Alan Buechler  
Vice President, Financial Reporting  
HCC Insurance Holdings, Inc.

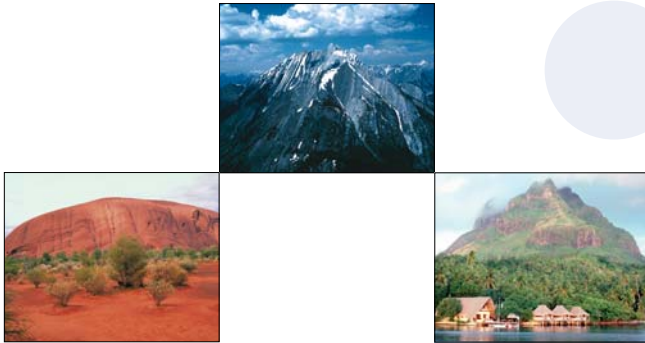


# HOW BPM PARTNERS HELPS

<b>Project Definition &amp; Justification</b>	<b>Technology Evaluation and Selection</b>	<b>Deployment Strategies and Management</b>
“Where do we want to go?”	“How will we get there?”	“What will ensure success?”
<b>Education</b> 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.	<b>IT Assessment</b> 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.	<b>Functional Architecture</b> Maps client requirements to the selected technology. Oversee key design decisions to optimize performance, minimize maintenance and deliver on original goals.
<b>Audit/Roadmap Workshop</b> 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.	<b>Vendor Selection</b> 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.	<b>Engagement Management</b> 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.
<b>Business Case Development</b> 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.	<b>Guidance on Software Negotiations</b> 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.	<b>Custom Education</b> Unlike generic product training, the focus of this end user education is your specific business use of the selected applications. This greatly reduces the learning curve and increases the successful adoption of your new BPM solution.
<b>Requirements and/or KPI Development</b> 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.	<b>Implementation Partner Selection</b> Includes implementation expertise assessment, recommendations for contract and cultural fit with project team.	<b>Pilot testing and roadmap development</b> 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 10 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 in 2006 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 in implementation services,

product marketing and solution selling. 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 consulting team has been responsible for hundreds of successful BPM implementations and a roughly equal number of software evaluations, including many in the FORTUNE 500 as well as midrange companies.

Craig Schiff was a founding member of IMRS/Hyperion Software, now Hyperion Solutions (NASDAQ: HYSL). During 16 years at Hyperion, he helped create and define the field known earlier as analytic applications, then business intelligence, and now business performance management (BPM). At Hyperion, Schiff ran the 500-person Products and Services Group. More recently, he was co-founder and CEO of OutlookSoft, where he oversaw the delivery of the first unified, web-based Business Performance Management solution. Previously, he project-managed the custom development of financial reporting systems for customers of GE Information Services Company including American Express and AMF. Mr. Schiff has published and spoken widely on BPM topics, and is a recipient of the Ernst & Young Entrepreneur of the Year award.



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