## ZYLTER

# TECHSTRATEGY ASSESSMENT IN

Personal Needs Report

**Report Prepared For: Christian Solomon** 

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### Hi, Christian. Thank you for completing the *Tech Strategy Needs Assessment*. Let's dive into your personalized report!

Based on your assessment responses, you are a Tech Seeker. You're looking to find the best expertise and resources for yourself. As a leader focused on both Strategic and Operational planning, you are seeking expert research and analysis to plan and execute your tech adoption. This report is designed especially for you.

We have applied our experience helping Tech Seekers to build you a personalized report. This assessment report includes a set of methods and resources from our *Tech Strategy Tool Kit* to address your specific needs for Core Strategy, Tech User + Workforce Analysis, and Tech Market Analysis + Business Development.

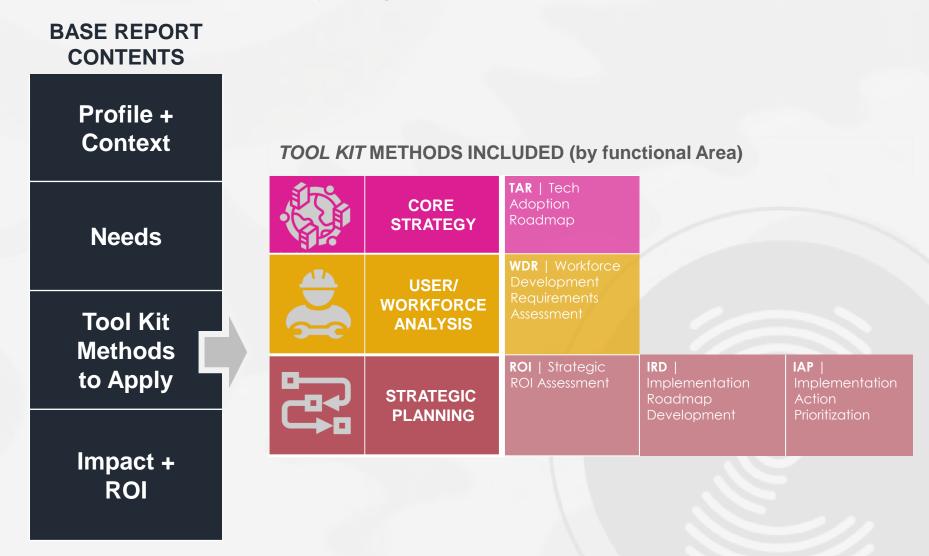


Christian, as a VP of Sales, you're a leader with a vision. You have an immense drive, motivation, and loyalty to your business's mission. You have a natural ability to ignite your team and others. We believe that with the right methods and resources, you can further capitalize on the qualities that make you, you!

### What's In Your Report

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This report includes a tailored assessment identifying your likely needs with five Tool Kit methods specifically designed to address them.



### How Your Report Compares to Other Leaders

Your needs link to complex challenges shared by industry leaders. It is important to know your market well and the others competing in your space



### Your Potential Needs

Areas you likely have interest and needs based on your responses





You need resources and methods that allow you to set milestones and conditions for long-term growth

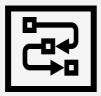


Operational Reengineering You need resources and methods that apply to different teams to meet a strategic objective. Working as efficient and effective as possible



Maximize ROI opportunities

You need resources and methods that always keeps the bottom line at the top of mind

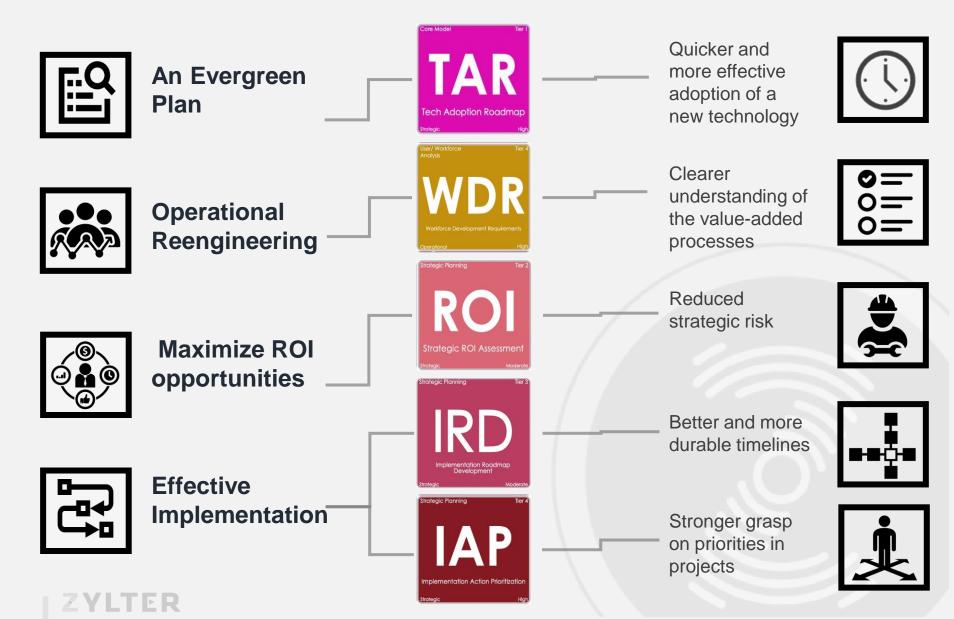


Effective Implementation You need a plan of least resistance to implementing new tech quickly and successfully



### Tool Kit Methods to Address Your Needs

The outcomes for applying Tool Kit methods to address your needs



### **TECH STRATEGY TOOL KIT MODULES TO ADDRESS YOUR NEEDS**

The following Tool Kit modules are included here to address your needs:



Tech Adoption Roadmap



Workforce Development Requirements



Strategic ROI Assessment

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Implementation Roadmap Development

Prioritization



# Core Model Tier 1 Tier 1 Table Core Model Tier 1 Tier 1 Tech Adoption Roadmap

### **Tech Adoption Roadmap**

This roadmap guides commercial leaders to navigate the innovation landscape to help identify truly promising innovations for their operations

#### WHAT IS IT?

HOW CAN I

**USE IT?** 

The Tech Adoption Roadmap provides a systematic approach to identify the specific phases, actions and milestones required for enterprise adoption of new technology or capability

#### Completion of this approach will enable you to answer...

- What actions are required to effectively find/adopt a new technology?
  - What are the lifecycle support considerations that should guide assessment of options?
  - □ What are the specific actions and milestones I need opt address to successfully find, adopt and support my technology initiative?

#### HOW DO I APPLY IT?

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- 1. Identify organizational user needs, key challenges and opportunities, organizational constraints, and other factors that will influence your needs and how the organization can address them
- 2. Identify and assess emerging capabilities alternative based on an initial technology scan: can be done by reviewing-industry-specific technology analysis & reports.
- 3. Build a practical and well-supported business case to explain the need and the value addressing it will generate for the organization
- 4. Translate qualitative user requirements into a set of solutions and attributes to describe and compare potential solutions across key capability areas
- 5. Identify the tech-based solution to test, deploy and refine
- 6. Identify and plan for the solution life-cycle support requirements
- 7. Determine areas to apply Tool Kit methods for detailed analysis

#### **HELPFUL HINTS**

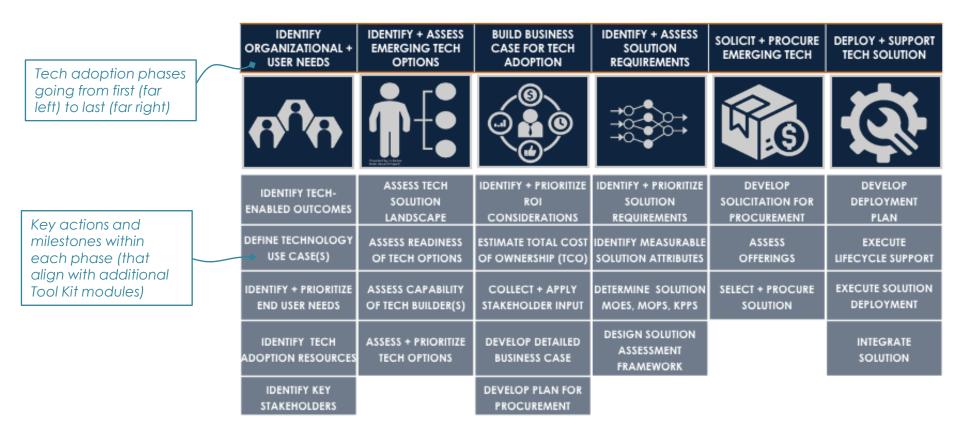
Adopting new technology is an essential step for any company and should follow a systematic approach and set of criteria to avoid poor implementation

To measure your implementation performance identify the critical technical and performance attributes that can be objectively measured for assessment and comparison or solution



### **Tech Adoption Roadmap**

The framework below outlines the phases and actions commercial leaders must complete to navigate the find and adopt new tech solutions to improve their operations. This roadmap is based on Zylter's extensive experience working with innovators and commercial leaders across industries. Each key action identified in the roadmap is addressed by a more detailed Tool Kit method.





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### **Workforce Development Requirements**

The Workforce Development Requirements is useful to identify and prioritize initiatives needed to develop the workforce

- WHAT IS IT?
- This module focuses on identifying and prioritizing actions to develop workforce capabilities to fully leverage new technology and address impacts on the sociotechnical system

### **HOW CAN I** Completion of this approach will enable you to answer...

- How scalable is your workforce development processes?
  - □ How will you help ensure the success of your new hirers?
  - □ How can you maximize productivity from initial hire?

#### HOW DO I APPLY IT?

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- 1. Identify each workforce group by position, organizational level, department, etc.
  - 2. Identify key impacts or changes o the new tech solution for workforce capabilities and skills of each group
  - 3. Identify and prioritize specific initiatives to address each priority need
  - 4. Organize or sequence initiatives for successful implementation

#### **HELPFUL HINTS**

Align your company goals and objectives prior to creating a workforce development requirements to ensure your workforce skills align

The initiate phase is the most extensive phase due to its foundational importance. Key aspects to ensure success in this phase is to assess the strategic needs the position requires. Outline the tasks the position will execute. Then match capabilities of the individual



### **Workforce Development Requirements**

The Workforce Development Requirements framework attached below lays out in phases with critical activities in each. These key activities look at the context and drivers for a growing and changing workforce, and the assets and skills needed in the sector. This framework intends to be a repeatable process refined over time.



	 	TIATE	PLAN	EXECUTE	MONITOR & CONTROL	CLOSE	
$\sim$	Position/ Role Eligibility Determination	Position Task Assessment	Baseline Plan Development	Work Unit Execu- tion	Monitoring & Con- trolling	Closing	
Workforce development breaks	POSITION ELIGIBILITY DETERMINATION	PRESCRIBED / REGULATORY TASK REQUIREMENTS	WORK UNIT TW EXECUTION PLAN	ROUTINE TASK ASSIGNMENT & EXECUTION	PERFORMANCE MONITORING & CONTROL	TELEWORK REMOVAL	
down into five critical phases. The initiating phase is the most	POSITION COMPARISON ASSESSMENT	EXTERNALLY-DRIVEN TASK REQUIREMENTS	COLLECTIVE-TO-INDIVIDUAL TASK CROSSWALK	DYNAMIC TASK ASSIGNMENT & EXECUTION	QUALITY MONITORING & CONTROL	TELEWORK REDUCTION	
extensive. This phase assesses the		PREDICTABLE TASK REQUIREMENTS	TASK SCOPING PLAN		CULTURE MONITOR- ING & AWARENESS		
individual, and the position's tasks		COLLABORATIVE TASK REQUIREMENTS	ONSITE REQUIREMENTS SCOPING		UNION NOTIFICATION		
ensuring a clear understanding of capabilities and		EXPERIENTIAL TASK REQUIREMENTS	GENERAL TEAM STANDARDS		TELEWORK AGREE- MENT CHANGE PROCESS		
needs match		IMMERSIVE TASK REQUIREMENTS	EMERGENT TASK RESPONSE PLAN				
		INFORMATION-HANDLING TASK REQUIREMENTS	PERFORMANCE MANAGEMENT PLAN				
			TELEWORK AGREEMENT MANAGEMENT PLAN				
Associated key actions and milestones			CULTURE & TEAM ENGAGEMENT PLAN				
1111103101103			FACILITIES USAGE PLAN TECHNOLOGY USAGE PLAN				





### **Strategic ROI Assessment**

The Strategic ROI Assessment identifies and assess the key factors influencing the expected return on investment from tech solution adoption

**WHAT IS IT?** The Strategic ROI Assessment compares multiple solutions based off set criteria that outlines the immediate and long-term business returns from the overall approach

#### **HOW CAN I** Completion of this approach will enable you to answer...

- How do I determine the research needed to make a sound decision?
- What are my business measures and goals associated with a successful ROI assessment?

#### HOW DO I APPLY IT?

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**USE IT?** 

- Identify and assess each type of cost and benefit associated with the tech solution
  - 2. Provide a brief description of each cost and benefit
  - 3. Identify key metrics to evaluate each type of cost and the benefits gained these can be financial indicatorsprofit, sales, costs, assets, or uniquely specific to your business measures and goals
  - 4. Identify critical strategic considerations and business drivers that support the key metrics. This is an opportunity to set priorities or a weighting scale to your key strategic considerations

#### **HELPFUL HINTS**

A Strategic ROI Assessment can vary in extensiveness, the example attached is a relatively brief analysis that allowed for a quick decisionmaking event, other cases can examine multiple solutions that have both short- and long-term impacts that require in-depth analysis

Depending on the risk and ROI a final decision should be made with crucial leadership individuals or stakeholders



### **Strategic ROI Assessment**

Before deciding on what solution to implement, it is vital to execute a strategic ROI assessment beforehand to enable an ideal future state. This framework breaks down two potential solutions into benefits and costs. Crosswalk these against a set of critical metrics and considerations. In this example, the business focused on financial gains

3.2 | Priority ROI considerations



These considerations are specific to the business's goals and support the key metrics to measure impacts

All criteria information stays within the conditions of the business type With a leadership

With a leadership team or key stakeholders take the Strategic ROI Assessment and come to a final summary decision

		Summary Description	Key Metrics to Measure Impact	Key Considerations for WF Tech Adoption
n Costs	Solution Cost 1	Initial Installation (700 Houses) \$337,463.00		Estimate 50 installs/mo 14mo build-out 7 toolkits, towers, access points needed
Solution	Solution Cost 2	Monthly Fees to Internet Service Provider (ISP) \$19,110.00	\$229,320 annual loss if no other solutions found	Estimate access point demand at 50% maximum usage
on fits	Solution Benefit 1	Raise home values by \$5000	+\$350,000 increase in neighborhood valuation	+\$12,537 immediate installation gains
Solution Benefits	Solution Benefit 2 Cost/home = \$27.30 monthly service charge		Charge minimum \$50/mo fee as the local ISP	+\$15,830 minimum monthly gains

Installation cost estimates result in immediate gains with increased home values.
 If decide to invest as an Internet Service Provider, estimate \$189,960 annual returns.











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Strategic Planning



### **Implementation Roadmap Development**

Identify and sequence the time-based actions for successful implementation of tech-based solutions

WHAT IS IT?

? Implementation roadmap development is a method to systematically identify the key actions required for a tech adoption project with the expected timeline of execution

#### HOW CAN I USE IT?

- Completion of this approach will enable you to answer...
- What are the key actions required to execute the implementation project?
  - What is a realistic timeline to complete the project and each discrete task?
  - What are the key dependencies among project actions and across tech implementation projects?

HOW DO I APPLY IT?

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- 1. Identify each discrete tech implementation project and its measurable end state
  - 2. Identify the key actions or tasks required to reach the project end state
  - 3. Estimate time required to complete each action
  - 4. Include the time required for execution of each task on a GANT-style chart based on the expected start date, duration and ending date
  - 5. During project execution update the progress each key action to reflect completion status

#### **HELPFUL HINTS**

Outline any constraints that are on this project before starting.

Example constraints can include whether the project already has an end date, the project has a set amount of hours that it can use, or phase(s) will be done by a third party

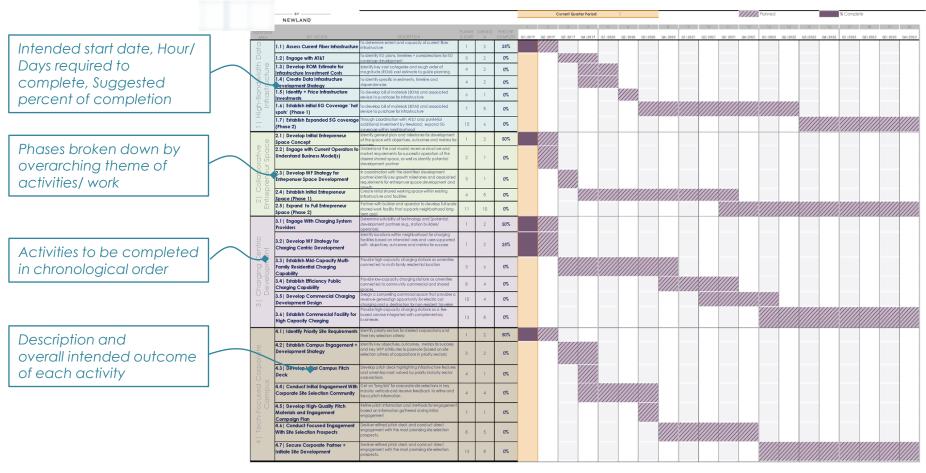
The end of each phase is an organic milestone and opportunity to recap to key stakeholders' progress made on the project



### Implementation Roadmap Framework

#### Apply framework to communicate actions, timelines, and dependencies

Our Implementation Roadmap Development Framework provides a method to identify key actions required to implementation a new tech-based solution. The framework breaks projects down into the sequential actions required with a summary description of each key action, expected timeline and duration based on a standard unit of time (e.g., quarter).



**RELATED STS** > ABM | Activity Based Management

APPROACHES > ABC | Activity Based Costing

➢ KPI | Activity KPIs



### **Implementation Action Prioritization**

The Implementation Action Prioritization is useful to prioritize the most impactful actions to address with limited resources

- WHAT IS IT?
- The Implementation Action Prioritization assesses and prioritizes recommended implementation actions based on the estimated cost, level of complexity and expected impact

#### HOW CAN I USE IT?

- **CAN I** Completion of this approach will enable you to answer...
  - How do I gain my stakeholders confidence that task, actions, and processes are well considered to enable the expected deliverables?
  - How do I maintain a high level of commitment among the Stakeholders during each phase of tech implementation?
  - □ How do I communicate and act with transparency?

#### HOW DO I APPLY IT?

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- 1. Gather an incorporate relevant existing plans and procedures
- 2. Identify, summarize and categorized all recommended actions
- 3. Assess the expected cost of each action
- 4. Assess the level of complexity for each action
- 5. Assess the impact / ROI expected to result from successful completion of the action
- 6. Complete visual mapping of the actions based on assessments

#### **HELPFUL HINTS**

Define what impact looks like in your business. We suggest starting with incorporating the overall goals and objectives of your business

Create opportunities to capture small wins. –This looks like small actions, tasks, or processes that have high to moderate impact and low costs and resources

Need help getting started identifying actions see IRD-Implementation Roadmap Development



### **Implementation Action Prioritization**

List of recommended

by category

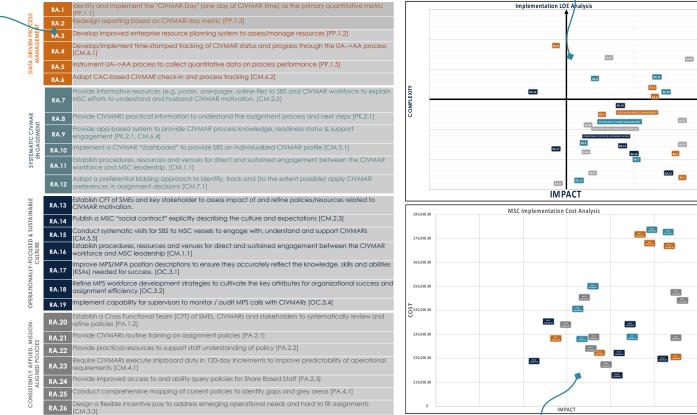
implementation actions

This implementation Action Prioritization gives an example of the fundamental elements of a strategic implementation process. This high-level process identifies and evaluates the impacts and costs of any actions, tasks, processes, and decisions and how they will flow within the organization



Categorization of recommended actions by estimated level of complexity and impact

#### PRIORITIZATION OF RECOMMENDED IMPLEMENTATION ACTIONS



Distribution of recommended actions by estimated cost and expected impact

### Apply our module catalog to address your growing needs

The Tool Kit has 70+ modules for all your tech strategy needs

	GROUP 0   CORE GROUP 1   STRATEGIC FRAMEWORKS PLANNING				GROUP 2  SOLUTION DESIGN + DEVELOPMENT			GROUP 3   SOLUTION LIFECYCLE PLANNING		GROUP 4   MARKET ANALYSIS + PRICING		GROUP 5   USER + WORKFORCE ANALYSIS			GROUP 61 PROCESS DESIGN + IMPROVEMENT						
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		PRICING	LEVEL OF SUPPORT	DESCRIPTION	
<b>MODULE TIERS</b>	TIER 1: SUMMARY APPROACHES	FREE	Published Resources	High-level approaches and resources that include multiple higher-tier methods. These are essential resources that we provide for free to guide user planning and assessment of needs.	[
	TIER 2: GENERAL APPROACHES	\$6,200	20 Hours of Expert Advise	Methods and resources that can be executed with mostly descriptive information and quickly applied to inform key decisions. These modules are scaled for immediate application with minimal support at an economical price.	
	TIER 3: DETAILED ASSESSMENT	\$16,200	60 hours of Expert Advise + Analytic Support	These modules guide application of extensive numeric and/or descriptive information for a more detailed examination and assessment. These modules come with a moderate level of support to guide and support user analysis.	
	TIER 4: TECHNICAL ANALYSIS	Based on Needs	Expert-Led Analysis + Tailored Support	These modules include methodologies that apply extensive numeric and descriptive data to answer complex strategic questions. These modules require a high level of expertise to execute. We provide a high level of dedicated support with specialized software and resources to execute.	

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#### Enclosed Ford Kit method is represented by a block in the table of Methods below. Each block includes essential information about the task set as described here. Method Abpreviation Functional Group Method Borg Sociotechnical System Approach Bergroup Vereit Strategic High

METHOD BLOCK DESIGN

### HOW ACCESS OUR EXPERTISE + SUPPORT TODAY



### What the Module Provides

Here is what you get in a module and how it works

#### WHAT A MODULE INCLUDES

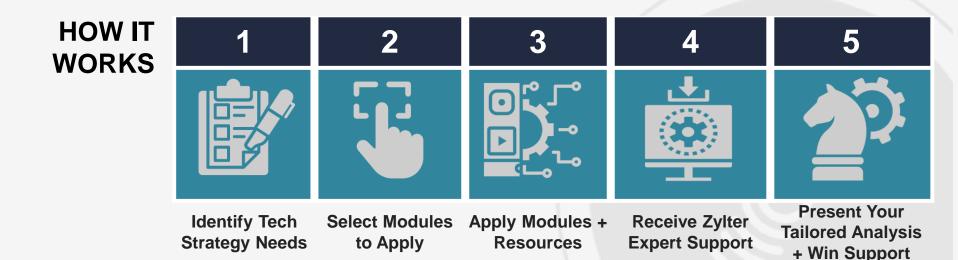
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#### 1| Tool Kit Method + Example Outcome Free as part of this report

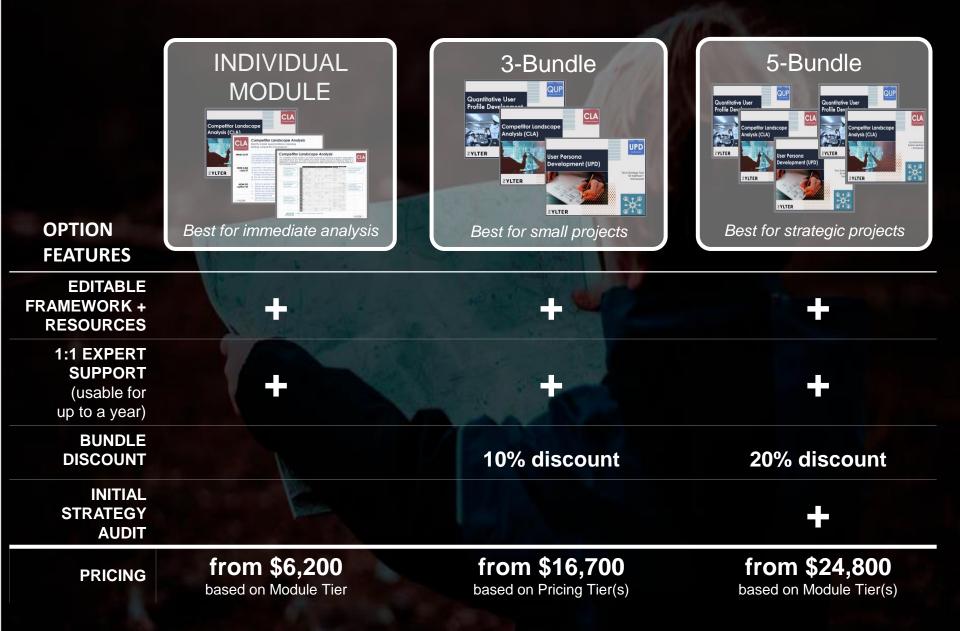
### 2| Editable Frameworks + Resources

Downloadable versions of method resources to tailor to your analysis

3 Expert Support to Apply Methods + Personalize Analysis Level based on pricing Tier, usable for up to 1 year



### **Compare Options to Get Started!**



## Thank you for accessing and sharing our resources!

We are passionate about the art and strategy of emerging tech adoption. Zylter thrives at the intersection of tech analysis, design and strategy. We appreciate any feedback you have to improve these methods and how we support them!

For more information or help applying this and other STS Toolbox resources, contact us at: <u>STS.solutions@zylter.com</u>

To explore the STS Toolbox further or access other methods and resources visit <u>www.zylter.com/sts-toolbox</u>

To learn more about our work with tech innovators and industry leaders at <u>www.zylter.com</u>



# We have the tools to make your future a reality !

### Take the next step and contact our solutions team at: <u>TSTK.support@zylter.com</u>



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