What to expect from the i-nexus Services team

Get to know our deployment method and the philosophy that underpins the support you’ll get from i-nexus.
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What to expect from the i-nexus Services team

Selecting i-nexus as your trusted Strategy Execution solution provider is the first important step in your journey to Strategy Execution excellence. This is your guide on what to expect from the i-nexus Services team as we help you to deploy the solution, build a strong user base, and assist your organisation in realising its strategic goals.

What do Services do?

The sole focus of the i-nexus Services team is to configure and tune the i-nexus platform to deliver the best possible return on your investment.

To achieve this we:

• Ensure users receive a simple, relevant and effective user experience that is laser-focused on your processes and meetings, and improves their day to day effectiveness
• Adapt labels and instructions to your corporate language
• Produce training material that guides users to your process and drive seamless, excuse-free adoption
• Adapt and shape reporting outputs and business intelligence to your needs and formats
• Integrate i-nexus to pull and push data from your other corporate systems, minimising re-keying and reducing non-value adding activity

When we do our jobs well, adoption pain is minimised, data is accurately exchanged, and the platform quickly fades into the background, enabling you to focus on execution and action.
1. How do we do it? Our five-step method

Our five-step implementation methodology has been honed over many years of successful deployment, and is designed with flexibility and speed to value firmly in mind.

1. Pre-configuration & On-boarding
2. Iterative Design & Configuration
3. Review & Refinement
4. Deployment & First Value
5. Final Deliverables & Close

You can find details of the milestones within each step in the table at the end of this paper.

1.1 Key principles

We believe passionately that the platform should support what you do and discuss, in as lean and simple a way as possible. Three key principles underpin this method:

• **Deliver first value within 90 days**

  Every software project is quickly under pressure to prove value. The five-step method focusses on delivering go-live with essential reporting within 90 days. Delivery of non-essential integrations and reporting then follow. These types of deliverable are reliant on a stable configuration. The project tail this creates also allows space for further refinement based on the system being “used in anger”, as the delivery team remain in place at your disposal.

• **Provide an iterative, incremental design approach**

  Process standardisation is hard. We expect you to iterate. Space for review and refinement means you can road-test the system internally. Creation of the WalkMe™ journeys as part of the configuration eliminates most of the requirement to formally train and allows you to easily share and review the system with representative users, while removing the overhead of a formal User Acceptance Testing (UAT) event.

• **Share best practice and keep things lean**

  i-nexus has been deployed many times, and developed in partnership with a wide variety of companies trying to solve the same problems. We ensure your project team is trained in the generic system before turning to your specific requirements. An appreciation of how the product works in its basic state avoids the temptation to “re-invent the wheel” and over-customise. A simplification checkpoint prior to go-live is designed to act as a brake on over-complication.
2. The team

We will apply a multi-disciplinary team to your project. Our consultants and implementation managers are based in both the UK and US, with most BI, reporting and integration resource based at our Coventry HQ where they work closely with the product team.

Typical lead time for major deployment projects is between 2 and 6 weeks dependent on the time of year.

Outcome Consultants

- Senior resource to safeguard long term deployment of i-nexus
- Ensure streamlined, agile and rapid deployment
- Provide process-based training to ensure the software platform is deployed well
- Facilitate agreement on clear success criteria
- Consult on business process design decisions and application of the platform
- Review the forward roadmap of adoption – identifying new opportunities and improvements as appropriate – for the long term success of our clients

Implementation Managers

- Co-ordinate delivery, configuration, testing & training aspects of the plan
- Work with client counterpart PM/PMO to manage communication for the project team and wider stakeholder group
- Run weekly review meetings
- Maintain the schedule and AID log
- Deliver the project plan on time on budget

BI & Integration developers

- Create & adapt data views & reports
- All reports delivered in i-nexus or Tableau BI solutions
- Integrate i-nexus data with key systems (push & pull)
- Migrate in-flight data

At the very start of the deployment, you will also be assigned a Customer Success Manager who will take responsibility for your onward journey once the deployment is complete.
3. Focus on Outcome consulting

i-nexus can literally transform your organisation's ability to focus and execute on your strategy, but the platform cannot do this entirely alone. Understanding your processes, developing the right plan, sequencing the roll out and creating the right messaging are all essential to achieving successful outcomes.

This is where our experienced Outcome Consultants come in. Where we need to adapt the out of the box configuration considerably to suit your processes, they will ensure a credible, workable and lean solution design.

Outcome Consultants ensure that:

- i-nexus is configured to suit your objectives and the cultural environment you work in
- The number and complexity of fields and reports can be made to suit your requirements, while maintaining best practice
- The tone of the deployment is matched to the organisation so that the change is adopted with as little friction as possible
- You can start with your most pressing needs and grow into the capability over time

Over-estimating user commitment and capacity to manage their projects through the platform can lead to poor adoption.

Outcome Consultants will advise on change management considerations and will work with you on a solid adoption plan and forward roadmap to match your culture and process maturity.
4. Business intelligence & reporting

Our business intelligence team of Report Developers and integrators are there to ensure you get the most out of the single source of the truth that you have purchased for your strategy execution.

Analysis of your report and “data-out” requirements starts with understanding the conversations you need to be having day to day, then choosing the best way to support them seamlessly with the data support in the right format. The appropriate solutions are matched.

Many of your requirements may be met using the reporting tables and views within i-nexus itself, such as My World Dashboard, and Financial Navigator. Where this is not enough, our solutions fall into four key areas:

4.1 Formatted standard, drillable PDF reports

Working with our in-house report scripting tool, they can format or script almost any required report, making it available straight out of the system or on notifications, with integrated data security. You can start with i-nexus basics, or completely customise your reporting - it's down to you.

1. Meeting standardisation:
   Standard reports can ensure all areas of the business report in the same way, removing NVA preparation effort, and ensuring the focus is on the data in the report.

2. Overcoming resistance to change:
   Re-production of report formats that your management have today can ease transition.

3. Driving the monthly drumbeat:
   These reports can be automatically sent out on notifications, ensuring management have the data at the right time, with next to no effort.

4. Giving executives mobile data:
   Providing visual drillable data on tablet or mobile devices.
KPI Status Report Example

Designed for management review, this report shows performance to budget and stretch targets over a year along with commentary and status of related action plans. It also supports the reforecast / countermeasure cycles.

Performance

- Budget
- Stretch
- Actual
- Forecast

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Targets To Improve Dashboard Example

A succinct overview of the Operational and Strategic Targets to improve for a given organisational unit also designed for management review. This report enables management to drill into the reds and links to the KPI status report above, enabling management to review commentary, actions and countermeasures.
4.2 Data views & Excel extracts

If you have an in-house reporting team, or wish to leverage your own BI solutions, the team can provide data views. The team produce data views onto the i-nexus report data layer (RDL) to enable you to “plug in” other reporting solutions to the data. From Excel to Tableau, this gives you a data environment to use with your own preferred dashboarding platform.

4.3 Working with other BI Solutions (Tableau & Power BI)

The team is also equipped to produce Tableau and Power BI dashboards on the i-nexus data for you to publish. This is a useful option should you wish to take advantage of our knowledge, or simply shortcut long internal lead times.
5. Integration

Effective integration is key to achieving your single source of truth for management, and to delivering all the benefits of strategic alignment and visibility which i-nexus can bring.

Our team use industry-leading technology to write operations which push or pull data to and from i-nexus, eliminating time re-entering data and ensuring you have a single source of the truth.

Most commonly deployed are:

- Active Directory integration to remove user management overhead, and ensure anyone can participate in action plans and projects
- KPI data import to remove re-keying from your reporting process
- Currency Exchange rates
- Project and financial summary data

The i-nexus integration team have three solution approaches and you can mix and match as required:

1. Connecting directly to your APIs and source systems
2. Providing our own APIs for you to connect with
3. Indirect via secure file exchange hosted via i-nexus
5.1 Blended integration approach to ease adoption variance

We deal with large and complex organisations where different processes, maturity levels and toolsets exist in different parts of the organisation. Integration can play a huge role in minimising the change impact across business areas with varying needs. Where parts of the organisation are already using well embedded project management or reporting solutions, we can import summary data from those systems, and combine it with other business areas using i-nexus direct giving you your single execution view.

We can also export i-nexus strategy data into a data warehousing platform to ensure you can include i-nexus insights into your business warehouse data.

6. Locking in the change training and adoption

The IT landscape is littered with failed deployments of good solutions which failed to catch on with the user base. At i-nexus we believe simplicity and user adoption are critical to success. The Services team can help you by customising training materials to ensure adoption and re-enforce your strategy and project best practices.

Using our onboarding partner platform WalkMe™, we can produce bespoke training and help journeys to assist first time and infrequent users. Well crafted training journeys will guide them in what to do and why they are doing it using your own business terminology and language, blending in process training to re-enforce best practice.

This can massively reduce training, testing and support overheads. No user with a WalkMe™ installed has an argument that they don't know what they are supposed to do and why.

The team can also adapt our materials to produce standard work, slide decks and videos to your requirements. We can also link i-nexus icons to your own intranet method training and support resources to ensure through the line messaging and support.

Likewise, the team is well versed in support for internal communication, and can create a programme of education and early site support to help to ensure the business is fully deployment ready.
7. In-flight data – hitting the ground running

Entering your own project or KPI data into i-nexus can be a great contextual training exercise. However, if your users have a lot of data or are particularly time-poor, we can import in-flight data to ensure that when they log on for the first time, they already see their data ready to go with minimum effort required.

Project and objective progress, year to date benefits and KPI values can all be brought in via operations using our integration team. We can adapt our set of standard migration routines to account for any custom fields you require, and provide straightforward templates to enable you to get us the right data.

8. Project governance

Delivering projects to experienced executives and project and strategy management professionals means we must be on our game. So, where else to manage your i-nexus deployment but in i-nexus itself?

- All project members from the customer team receive access to the i-nexus project plan, risks, journal and documents to view progress
- Project progress meetings are typically held weekly with the onboarding throughout the deployment and ad hoc as required
- Progress meetings consist of progress overview against deliverables, review of progress against milestone plan, review of burndown of services effort and discussion of any key decision points
- Actions, decisions, change & opportunity logs are kept and version-controlled on the i-nexus project for all team members to access
9. Getting on-site & expenses

While the bulk of the i-nexus deployment project can be carried out remotely, nothing accelerates project progress like face to face contact.

Most of the project can be delivered remotely, but i-nexus recommend on-site attendance for design and configuration workshops, and for expert user training/testing.

Travel expenses are estimated as part of the Statement of Work or Engagement Summary. Actual costs are agreed in writing before commitment, and are charged as cost incurred.

Expense reports are provided alongside regular burndown reviews.

We are happy to comply with all reasonable customer expense policies and to work with customer preferred providers for accommodation and transport if preferred.

10. Change control

It is common for priorities and emphasis to change through a deployment.

If so, effort can be repurposed, or additional effort can be contracted for. We are happy to accommodate as the key focus is your success.

Scope change, both commercially and non-commercially affecting must follow a sign off process and we take time to define this with you in discovery, and ensure all key stakeholders are included.

Scope changes are recorded both in the journals on the i-nexus project, and in the decision log.
11. Delivery modes statement of work vs open engagement

i-nexus’ Services team typically work to a Statement of Work.

Produced as part of the project initiation, this document defines in some detail the scope, assumptions and success criteria related to the project, alongside details of the estimated effort involved and a plan of execution featuring key milestones.

This document is kept as the delivery contract for the project and is subject to change control.

Alternatively, for our larger clients, where delivery details are less certain up-front, we can make a dedicated project team available for a period.

In this case, an engagement summary is used to outline the success criteria, assumptions and terms of the engagement.

The detailed scope is left more fluid, and resource is kept available to design and configure to requirements as they arise. Requirements are captured in more detail once clear at the appropriate points.

12. How long does it take?

i-nexus aim to achieve first value on a deployment within 90 days, and to complete requirements within 4-5 months, allowing time to guide you through one or two monthly reporting cycles.

The length of engagement can depend on several factors including the readiness of customer requirements, the scope and size of the organisational roll out.
13. What does it take?

13.1 i-nexus effort

On the i-nexus side, deployments average 40-60 days but can be highly variable depending on:

- The level of customisation required
- The size of the reporting and integration requirements
- The maturity and readiness of the customer project team

i-nexus has historically been successfully deployed in as little as 10 days and as many as 200. What is important is to understand your specific needs and estimate for success.

13.2 What will it take from us?

i-nexus expect to be working with the following roles through the project, and to be successful these should be identified as early as possible in the engagement:

**A counterpart project manager**

Their role is to co-ordinate stakeholders and resources and timelines on the customer side, and make day to day decisions.

This person is likely required 0.5 to 1 FTE for the duration of the deployment. You should also consider secondary cover.

**A sponsor**

Who can oversee the project and champion the change in the business.

They should attend weekly briefings, and act as a point of escalation should things not go fully to plan.
Other stakeholders and representative users (optional)
It is a good idea to involve more important stakeholders where they represent special interests and user groups, in helping to road-test early iterations in WalkMe™.

IT support (required)
i-nexus is delivered as SaaS over private cloud which means low cost of ownership. However, IT will be needed to co-ordinate set up of Single Sign On, as well as any integrations of data view leverage in scope.

Learning and development (optional)
i-nexus can be extremely powerful when embedded in methodology training. If you have a L&D team or PMO training function, it can be a great idea to involve them in the training and adoption aspects of the project to ensure through the line messaging and consistency of approach.

Onward support and governance (required)
Once i-nexus is live, there will be a light need for management and ongoing support, escalating questions and issues, and helping the management team keep the platform current as processes move. Active Directory and WalkMe™ remove the necessity of user management, and a substantial portion of training and adoption questions, but enough remains to require anything from 0.2 to 0.5 FTE going forward, dependent on the deployment. It is a good idea to identify who will support and involve them as early as possible in the project.
14. What if our needs change?

i-nexus' Statements of Work are typically created on a time and materials basis. If scope changes significantly, a change control process is triggered.

Extra effort can be repurposed from other descoped items, or additional effort can be contracted. Change orders are added as addendums to the Statement of Work.

15. How do you test the configuration?

Configurations are “road-tested” by neutral members of the i-nexus project team before release to the customer.

We recommend that processes are then tested in the platform by a representative sample of customer users to ensure suitability.

16. Specification & the configuration baseline

The system is in a large measure self-documenting.

However, any customised reports and integrations are subject to a written specification which records what the work is designed to achieve and how it has been implemented.

These documents live on past the project as records of the deployment and are updated with any subsequent changes.

With WalkMe™ deployed, it becomes easy to socialise the platform to a test user community and gather feedback for iteration.

17. What happens at the end of deployment?

Following onboarding phase, i-nexus will provision a Customer Success Manager to oversee the ongoing success of your investment, and co-ordinate further work.

Regular reviews are held to keep you up to date with new features, monitor your usage, answer queries, help you with internal governance, and support you getting the most out of the product.
18. What makes a successful i-nexus deployment?

A strong client project team empowered to make decisions, reporting to a sponsor who is engaged in the process and attends the weekly progress reviews.

Positive IT engagement to smooth the set-up of Single Sign On and integration work.

Laser focus on the success criteria, and “playing the movie” of how i-nexus will help the organisation in its processes. Reviewing each meeting in which i-nexus will be used and ensuring the system and reports are tuned to give maximum value.

A crawl-walk-run approach. Keeping the starting point – the initial set-up - as simple as possible.

Where necessary, phasing, which enables value to be demonstrated quickly – emphasise value to users as well as executives.

Change management consideration. Transparency can make people uncomfortable. Successful deployments pay close attention to communication with the user base, both in style, timing and content. Consider what is changing and craft the right messaging to achieve buy in and adoption.
## 19. The five steps in detail

<table>
<thead>
<tr>
<th>Phase</th>
<th>Purpose and i-nexus led activity</th>
<th>Client responsibilities</th>
</tr>
</thead>
</table>
| **Initiation**<br>pre-configuration & onboarding | • Set up of relevant domain, organisation and reporting structures and data categories  
• Walk through of relevant standard i-nexus functionality to level-set the team  
• Facilitate with the wider company “what’s coming” onboarding sessions if required in the communications plan | • Advise on data structures and relevant domain settings  
• Attend walk through sessions |
| **Iterative design & configuration** | • Series of half-day sessions to walk through the process, configuration design, and then integration and reporting requirements. Half-day playback and design and then half-day configuration  
• A first-cut system configuration with high level WalkMe™ journeys  
• ‘Single sign-on’ deployment is mandatory | • Attend series of half-day workshops  
• Review the system as it is built and advise on design choices  
• Provide data structures, and definitions in your organisation process language  
• Provide input on reporting requirements including examples and meeting design |
| **Review & refinement** | • Period to review and road-test the configuration. WalkMe™ will allow customer team to socialise the configuration internally and test it with samples from the user base  
• Regular meetings to review feedback and adjust configuration  
• Reports and integrations will be specified in this phase once the configuration is relatively stable | • Attend sessions to review configuration  
• Provide feedback  
• Work with users internally to road test the configuration  
• Assist in report & integration definition  
• Sign-off specifications  
• Sign-off configuration at end of phase |
| **Deployment & first value** | • In-flight data migrated  
• Active directory and other regular scheduled Integrations activated  
• Simplification check-point  
• Expert / champion user training delivered  
• Official go-live | • Sign-off on data migration  
• Work with i-nexus to complete required integrations  
• Attend / deliver training to plan |
| **Final deliverables & close** | • Remaining reports, and integrations delivered  
• Changes to system stabilised through first review cycles  
• Sign off project deliverables and progression to programme close | • Sign off remaining reports and iterations  
• Utilise i-nexus through first cycles  
• Agree delivery and authorise progression to programme close |