



Transforming Solutions, Inc.

## Service Offering and Practice Overview

# TSI 101

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- 20 years old
- Chicago based and service clients domestic and global
- 25+ Experienced Consultants, many from “Big 4” and other “brand name” consultancies
- Leverage best practices across industries
- No relationships with software vendors that would cause a conflict of interest
- **Deliver result focused, pragmatic solutions that withstand the test of time.**



# The TSI Difference

Who we are...

TSI is the management consulting firm of choice with **experienced thought leaders** that **closely collaborate** with your team and leverage our **proven approaches and cross-industry experience** to bring innovative, high-quality, end-to-end solutions to life.

We do this through our core services...

- Technology Assessment, Strategy Creation and Platform Optimization
- Customer Experience Analysis and Optimization
- Process Redesign, Streamlining and Cost Reduction
- Organization Design, Development and Organization Change Management

**The bottom line is.... We don't stop where other consultants do, we help you define a future state, and *we partner with you to get there***



# Results

Our services produce the following results:

- Streamlined processes that are faster, more efficient and higher quality
- Software selection so that the best fitting, cost effective and scalable software platform is selected and implemented PROPERLY
- Improved processes and technology that is endorsed by key stakeholders, adopted and leveraged to make a difference.

Through TSI's history, we have worked with some of the fastest-growing companies and most progressive brands....



# TSI is a Collaborative Partner – *from Start to Finish*

## Assessment

- TSI will thoroughly analyze the current state of your organization in the context of the change you seek.

## Analysis

- Leveraging our deep expertise and experience in multiple sectors, TSI will analyze our current state assessment and clearly define the organizational, process and technology changes involved to transform your institution, in the manner your strategies demand.

## Recommendation

- Given the magnitude of expected change, TSI will recommend a comprehensive course of action to close the delta between current and future state.

## Implementation

- While most consultants stop here, TSI will partner with your team to see changes through to full implementation. We are experts in operationalizing change, and we will be with you every step of the way.

## Evaluation and Maintenance

- Organizational inertia is change's greatest enemy. TSI will work with you to ensure that your changes are sustainable, measurable and reinforced.

# The TSI Guarantee

TSI guarantees that our engagements will deliver specific, tangible and results-oriented recommendations within the budget that we set forth. Unless the scope of our engagement is changed through mutual agreement, we will deliver within the costs quoted.

*The TSI guarantee assumes that clients uphold all client availability and transparency expectations (i.e. attend meetings as scheduled, provide needed data, etc.)*

# TSI Core Service Areas

## Detailed View

# Technology Strategy Creation and Analysis

## Service Description

With increasing dependence on effective technology to enable strategic and tactical results, it is critical to select, implement and continually improve an organization's investment in technology.

TSI has deep expertise helping companies solve these challenge in an unbiased and cost effective manner.

## Questions To Answer

- Do we have the right technology and are we using it to maximize our efficiency?
- How much do we currently spend in IT/IS?
- How integrated or disparate are our applications?
- How extensively are we utilizing technologies we have spent significant money on? What can we do to improve our performance in this area?
- Do we have the proper governance structure, processes, staffing, etc.? Is our Technology Infrastructure adequate given our strategic plan?

## Sample Outcomes

- Information technology roadmap and strategic plan
- Section of the best fitting software package to help meet your growth plans
- Assessment of IT/IS:
  - Technology infrastructure
  - Organization and staffing levels
  - Processes
  - Governance
  - IT expenditures that occur both in and outside of IT/IS
- Implementation of recommendations to transform how IT operates so it is in alignment with those constituents it serves

# Technology Evaluation and Selection

## Software products in recent evaluation projects:

- Acumatica Cloud ERP from [Acumatica](#)
- Coda Financials from [Unit4](#)
- [Epicor Enterprise](#) from [Epicor](#)
- Epicor ERP from [Epicor](#)
- Exact MAX from [Exact Software](#)
- Exact Macola ES from [Exact Software](#)
- Exact Globe Next from [Exact Software](#)
- Exact Online from [Exact Software](#)
- FinancialForce ERP from [FinancialForce.com](#)
- IFS Applications from [Industrial and Financial Systems](#)
- Infor10 Distribution Business (aka SX.Enterprise) from [Infor Global Solutions](#)
- Infor10 ERP Business (aka Syteline) from [Infor Global Solutions](#)
- Infor10 ERP Ln (formerly [Baan ERP](#), [Baan IV](#) and [Triton](#)) from [Infor Global Solutions](#)
- Infor10 ERP Process Business (aka Adage) from [Infor Global Solutions](#)
- Infor LN - [http://www.infor.com/product\\_summary/erp/ln/](http://www.infor.com/product_summary/erp/ln/)
- [Intacct](#) and Intacct Accountant Edition
- Intuitive ERP from [Consona Corporation](#)
- [JD Edwards](#) EnterpriseOne from [Oracle](#)
- Made2Manage ERP from Consona Corporation
- Microsoft Dynamics AX (formerly Axapta) from Microsoft
- Microsoft Dynamics GP (formerly Great Plains) from Microsoft
- Microsoft Dynamics NAV (formerly Navision) from Microsoft
- Microsoft Dynamics SL (formerly Solomon) from Microsoft
- mySAP from SAP
- NetSuite from NetSuite Inc.
- Opera (I, II and 3) from Pegasus Software
- Oracle E-Business Suite from Oracle
- Oracle Fusion from Oracle
- PeopleSoft from Oracle
- Plex Online from Plex Systems
- QAD Enterprise Applications (formerly MFG/Pro) from QAD Inc
- Sage PFW ERP from Sage Group
- Sage Pro ERP from Sage Group
- Sage 100 ERP (formerly Sage ERP MAS 90 and 200) from Sage Group
- Sage 300 ERP (formerly Accpac) from Sage Group
- Sage 500 ERP from Sage Group
- Sage ERP X3 from Sage Group
- SAP - <http://go.sap.com/product/erp.html>
- SAP Business ByDesign from SAP
- SAP Business One from SAP
- SAP ERP and SAP S/4HANA
- SYSPRO from Syspro
- Workday from Workday, Inc.

# Process Redesign and Cost Reduction

## Service Description

With competition levels reaching new heights, and technology reducing consumers' perceived switching costs, operating with efficiency and effectiveness has never been more critical.

TSI has the expertise required to help you determine a pathway to operations that continually redefine the efficient frontier.

## Questions To Answer

- Where are we inefficient and wasteful?
- What recommendations will reduce expenses and streamline operations?
- What “shared service” opportunities exist where there are redundant and decentralized operations today?
- How many “hoops” do our staff members need to go through to do their work?
- How do I improve customer-facing and other administrative processes so that we can attract and retain high value customers and top talent?

## Sample Outcomes

- Organizational Cost Assessment and Implementation Plan
- Implementation of recommendations resulting in:
  - Reduced OPEX – TSI has implemented recommendations saving 14-35%
  - Faster completion of work/processes
  - Improved quality, accuracy and service levels
  - More consistent compliance with regulations

# Customer Experience Analysis and Optimization

## Service Description

Customers continue to expect more and more from those companies with which they interact, and customer loyalty trends are frightening. TSI has expertise in capturing the voice of the customer, and understanding their view of the experience you provide. From this point we can work with you to redefine multiple aspects of your operation to achieve an optimized aggregate customer experience.

## Questions To Answer

- How do our customers, staff and collaborators perceive current state?
- What inefficiencies exist in current state processes?
- How do we optimize for both experience and efficiency?
- How does our current culture incentivize or disincentive great service?
- Do our organizational structures drive the right accountabilities?
- Do our teams have the right skills and abilities to deliver our desired customer experience?

## Sample Outcomes

- Voice of the customer measurement system to benchmark and trend experience perception over time
- Process redesign and implementation to streamline and simplify operations
- Cross-departmental hand-off analysis to reduce duplication and simplify the customer journey
- Customer loyalty cycle analysis and action planning
- Technology assessment and implementation support to enable automation
- Organization structure, job and task analysis and redesign to embed a student-centric approach
- Service culture implementation and change management strategy to create a common call to action
- Service and job skills training programs to increase effectiveness

# Organization Change Management

## Service Description

The most challenging part of implementing change is often the act of leading your team through the transformation. Process improvement, technology implementation, and strategic planning are only useful to the extent that the core elements of change can transcend into the daily activities of those doing the work. TSI has a proven track record of crafting action-oriented change management strategies that engage both the hearts and minds of teams at all levels.

## Questions To Answer

- Who are the key stakeholders of this change, and what are their current and desired levels of influence and support?
- What is the institution's current capacity for change?
- Does the team have the appropriate level of awareness, involvement, desire and knowledge to move through this change?
- Do your leaders have the appropriate skills and empathy to lead change?
- What reinforcement is needed and planned to avoid regression once we reach the future state?

## Sample Outcomes

- A stakeholder analysis and heat map
- Change readiness survey and analysis
- An vision that clearly articulates the need for change and creates urgency
- A detailed change management plan and activities
- Change leadership training for key organizational leaders
- Communication plans and collateral
- Retention strategies for key positions and individuals
- Skill-based training plans for contributors
- Reinforcement plans and enhanced performance management systems

# Organization Design and Development

## Service Description

Any organization is only as good as its people. Supporting your corporate strategy with the right culture, values and talent strategy is critical for any fast-growing firm.

TSI brings expertise in crafting the right organizational design, with the right roles, incentive structures and collaborative practices to align your talent profile, culture and strategy.

## Questions To Answer

- Does our organization structure support our strategy?
- How does our culture incentivize or disincentive our target behaviors?
- How effectively do we collaborate across different departments, business units or geographies?
- Do staff and faculty clearly understand what is expected from them regarding both what they do **and** how they do it?
- Do we have the right talent mix to achieve our objectives? If not, how might we build or buy that the needed talent?

## Sample Outcomes

- Redefined organization structures such as organization charts or matrix organization designs
- Job analysis and refinement
- Updated job specifications, performance management systems and RACI matrices
- Linkage analysis between organization mission, vision, strategy, culture, values and talent profile
- Incentive system implementation
- Numerous culture alignment initiatives designed to address both knowledge and desire states
- Success profile and selection system implementation
- Leadership development training
- Executive coaching

# Contact Information

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