

Chargeback Adoption Framework

Regardless of who (Central IT, Finance, Procurement) or where you are on the journey...

What are my options?

Audience

- Central IT, Finance, Procurement

Use Case(s)

- Shared Services Chargeback
- Central IT Modernization
- Streamline Contract Management
- Compliance (OMB Circular 87)
- Invoice Reconciliation

Define Requirements

- As Is / To Be
- P2P – CPQ – Q2C – Reporting

Define Constraints

- Leverage existing ERP, ESM
- Incorporate Multi-Cloud, On-Prem, HW, SW, SVCS, CAPEX, OPEX, Labor
- Resource / Budget Limitations
- Data Quality / Management

Next Steps

- Art of Possible Envisioning Session
- Custom Workshop
- Peer review, system overview (Demo)

 **EXPLORE**

Will it work for us?

People

- Upskill, Outsource or Reallocate
- User Experience

Process

- Shared Services Enablement
- Product / Service Catalog creation or consolidation
- Billing, Rebilling, Allocations

System & Data

- ERP, ESM, CRM, Invoicing
- Legacy, Specialty, Custom
- Agency specific data, security reqs

Next Steps

- Budget & Timeline
- TCO
- Implementation ~ 4- 6 months
- Customer Go / No Go

 **VALIDATE**

How do we ensure success?

Foundations

- Deploy Production Architecture
- Finalize Service Catalog
- Deploy System UI

Integration

- Data Mapping
- Integrate with Current Systems
- Onboard Central IT, Finance, Procurement

User Acceptance Testing

- Agency User Testing
- Validate and Iterate Invoicing and Exception Handling

Define Operating Model

- Agency vs Co-Managed vs CBaaS

Next Steps

- Prepare to Go Live
- Agency user training
- Deployment communications
- GO LIVE

LAUNCH 

How does it get even better?

Re-Discovery Post Launch

- Fine tune user experience
- Identify gaps, new use case(s)

Governance and Compliance

- GAAP compliance
- OMB Circular 87 Compliance

Reporting & Intelligence

- BI Dashboard
- Revenue Analysis
- Service Catalogue Analysis
- Forecasting

Next Steps

- Operational Excellence
- Turn-key CBaaS Administration
- Predictive Revenue Modeling
- Data Driven / Optimized
- Quantified Metrics and Maturity

OPTIMIZE 

Explore Phase

Audience

- Central IT, Finance, Procurement

Use Case(s)

- Shared Services Chargeback
- Central IT Modernization
- Streamline Contract Management
- Compliance (OMB Circular 87)
- Invoice Reconciliation

Define Requirements

- As Is / To Be
- P2P – CPQ – Q2C – Reporting

Define Constraints

- Leverage existing ERP, ESM
- Incorporate Multi-Cloud, On-Prem, HW, SW, SVCS, CAPEX, OPEX, Labor
- Resource / Budget Limitations
- Data Quality / Management

Next Steps

- Art of Possible Envisioning Session
- Custom Workshop
- Peer review, system overview (Demo)

EXPLORE

- During the explore phase we will identify use cases and match them to internal capabilities.
- As gaps are identified, we will work with platform providers to demonstrate required functionality
- Based on requirements, funding and schedule we will propose and implement mutually agreed roadmaps
- Primary focus is to leverage existing technical debt while modernizing the overall process to create a frictionless, high value customer experience

Validate Phase

People

- Upskill, Outsource or Reallocate
- User Experience

Process

- Shared Services Enablement
- Product / Service Catalog creation or consolidation
- Billing, Rebilling, Allocations

System & Data

- ERP, ESM, CRM, Invoicing
- Legacy, Specialty, Custom
- Agency specific data, security reqs

Next Steps

- Budget & Timeline
- TCO
- Implementation ~ 4- 6 months
- Customer Go / No Go

VALIDATE

- The purpose of the Validate phase is to prove out the approach will work specifically for the State using its systems, processes and data
- This usually includes a feed of two to three data sources of the Government's choosing
- We use the concept of Guided Production Pilot's which may include utilizing existing or new data processing environments
- Requirements are finalized and results are validated to prove value

Launch Phase

Foundations

- Deploy Production Architecture
- Finalize Service Catalog
- Deploy System UI

Integration

- Data Mapping
- Integrate with Current Systems
- Onboard Central IT, Finance, Procurement

User Acceptance Testing

- Agency User Testing
- Validate and Iterate Invoicing and Exception Handling

Define Operating Model

- Agency vs Co-Managed vs CBaaS

Next Steps

- Prepare to Go Live
- Agency user training
- Deployment communications
- GO LIVE

- The launch phase starts with confirming benchmark data and identifying remaining data sources that need to be ingested
- We finalize all documentation, ensure end users are trained and provide change management guidance for agency adoption
- Depending on requirements this phase may be self-managed by the State, co-managed or fully managed (outsourced)

LAUNCH

Optimize Phase

Re-Discovery Post Launch

- Fine tune user experience
- Identify gaps, new use case(s)

Governance and Compliance

- GAAP compliance
- OMB Circular 87 Compliance

Reporting & Intelligence

- BI Dashboard
- Revenue Analysis
- Service Catalogue Analysis
- Forecasting

Next Steps

- Operational Excellence
- Turn-key CBaaS Administration
- Predictive Revenue Modeling
- Data Driven / Optimized
- Quantified Metrics and Maturity

- As data is processed and customers experience the platform, it is natural to re-baseline efforts about 6 months into production
 - This allows for sufficient time to uncover areas of high value for further optimization / refinement
- We re-review policy constraints and allocation methods to make sure that the system rules appropriately match usage patterns
- We then dive into the data looking to provide recommendations for rightsizing resources, refactoring legacy systems and provide strategic guidance to agencies to optimize their infrastructure spends

OPTIMIZE