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CPE Credit

⏱ 0 min(s)

Criteria for Full Credit

◯ Minutes to Watch: 50

◯ Number of completed Poll(s) required: 3

Steve Shannon

Director

Partnership Marketing, Business Development

IMA

Featured Presenter

Raja Sekhar, PMP, Six Sigma Blackbelt, PLD from Harvard

Vice President, Enterprise Solutions &

Hi-Tech Industry Vertical Leader

Jade Global

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Raja Sekhar's Biography

- Raja is the VP of Enterprise Applications for ERP and CRM LOB at Jade Global. He has 20 years of IT experience playing different roles in different organizations including technical analyst, business analyst, project/program manager, delivery manager, practice manager and now running a Line of Business since for the last 5 years. Raja has deep experience in the hi-tech industry and has a strong passion for digital transformations, solution engineering, new service development and program management. He has strong expertise in ERP, CRM, Supply Chain domains with a deep understanding of technology including Cloud, Mobile, Analytics and Integrations.

- Before joining Jade Global, Raja was at Tata Consultancy Services managing some of the large implementations.

- Mr. Sekhar is a PMP, Six Sigma Blackbelt, CSQA, CMM and OCP Certified. He has completed executive education from Haas School of Business of UC Berkeley and Program for Leadership Development at Harvard Business School.

Learning Objectives

Upon completing this webinar, you will be able to:

1. Explain the broader definition of the hi-tech industry.
2. Discuss key industry challenges and use cases.
3. Evaluate your organization's end-to-end business processes.
4. Identify the core business process and complexities.

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Jade Global

Strategic IT services provider

Toronto
San Jose
Philadelphia
Southern California
Vienna
Pune
Hyderabad

Services

High-Tech

Energy & Utilities

Manufacturing

Media & Entertainment

Healthcare & Life Sciences

Financial Services

Public Sector

Retail & CPG

2003
Founded

7
Offices
Worldwide

4
Global Delivery
Centers

350+
Customers

99%
Customer
Retention

2000+
Technology
Projects

100%
Referenceable
Customers

Agenda

- Execution & Systems Relationship

- Hi-Tech Challenges

- Business Processes & Complexities

- Summary

- Q&A

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Polling Question 1

What is the biggest challenge you face to execute business strategy?

a) Lack of communication
b) Lack of leadership
c) Lack of systems
d) Lack of ideas
e) Unclear strategy

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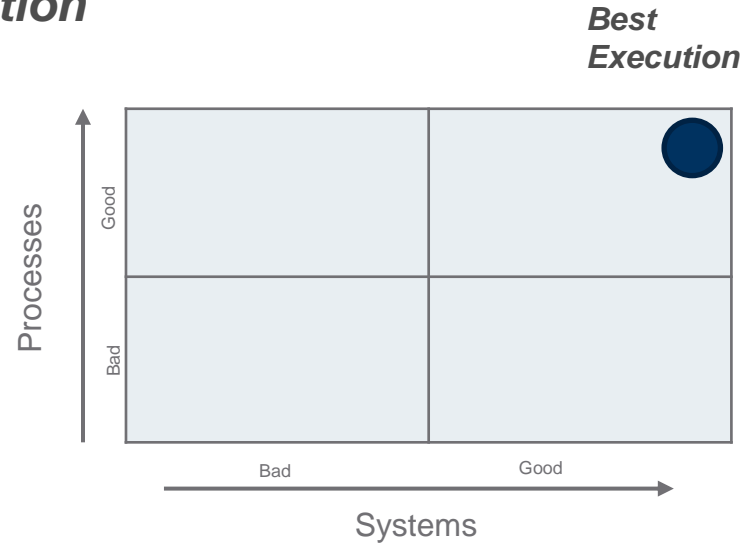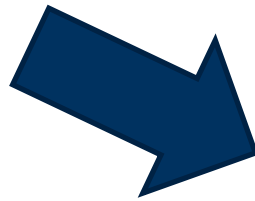
Polling Question 1 Results (Placeholder)

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Execution & Systems Relationship

3 Pillars of Organizational Success

Idea

Strategy

Execution

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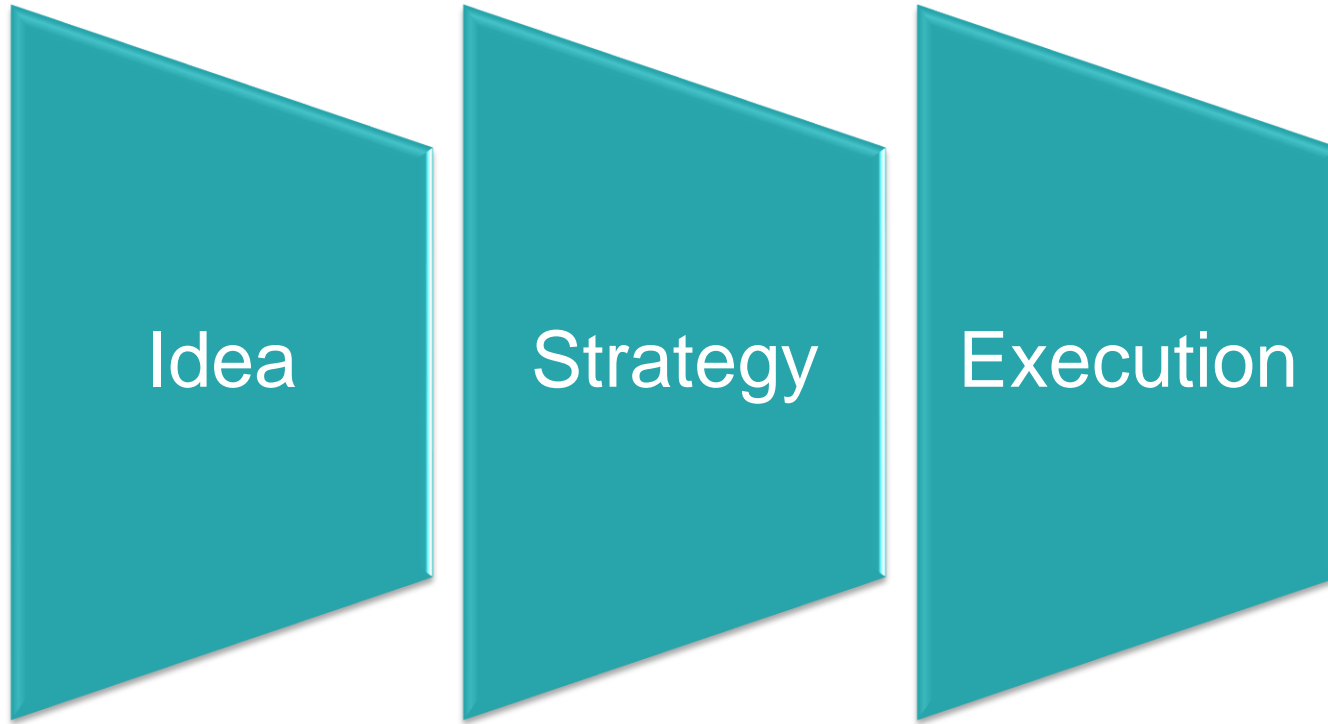
Pillars of Execution

- **4DX = The 4 Disciplines of Execution**
- **Gartner: The 5 Pillars of Strategy Execution**
- **PMI: Four Ps of strategy execution**

Best Execution

Processes

Good

Bad

Bad   Good

Systems

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Hi-Tech Industry & Challenges

Polling Question 2
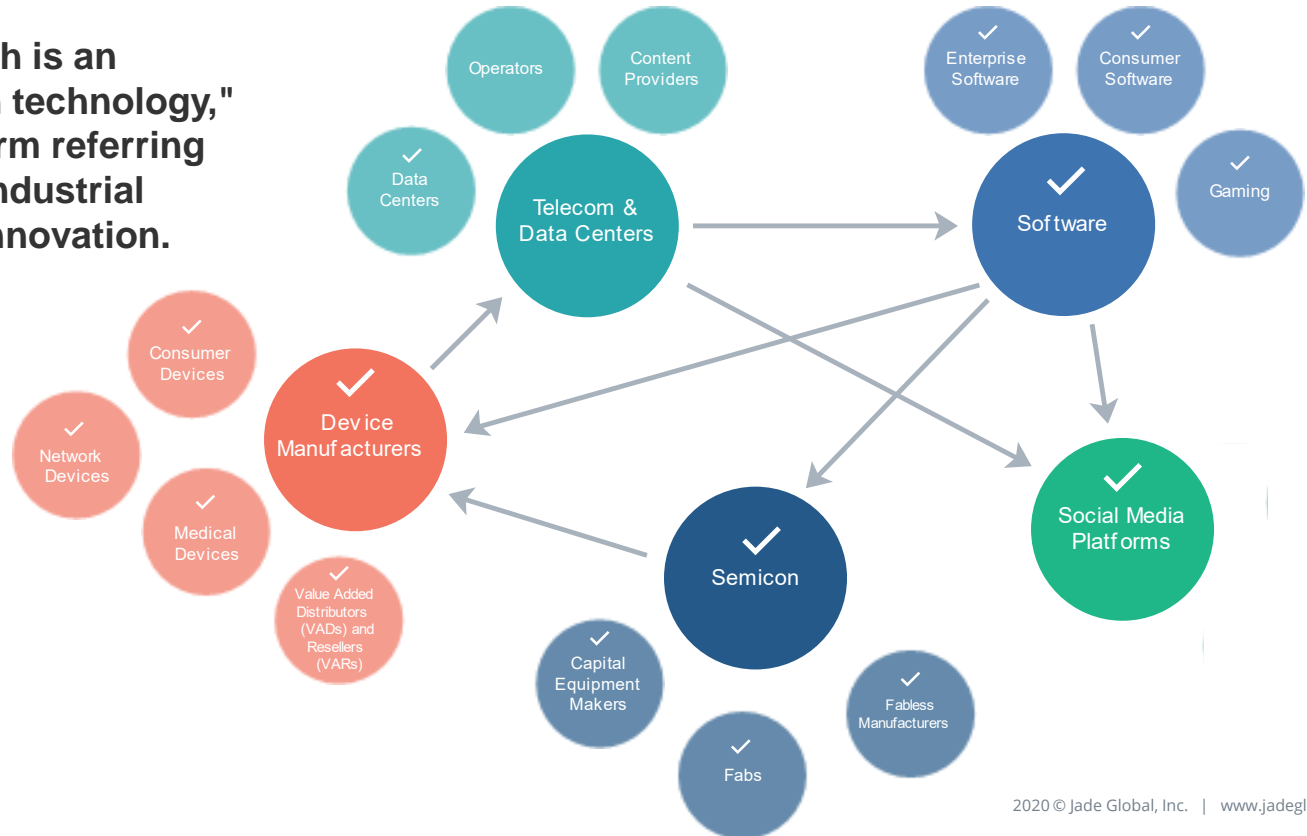
Which industry do you represent? (select up to 2 options)

a) Manufacturing
b) Hi-Tech
c) Banking
d) Public Sector
e) Hospitality
f) Others

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Polling Question 2 Results (Placeholder)
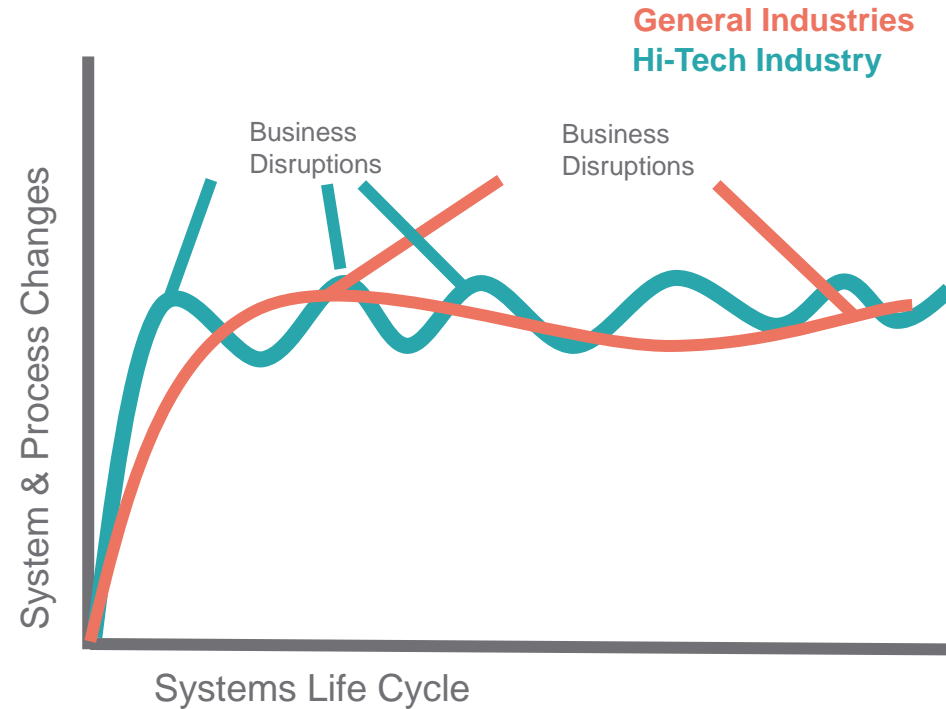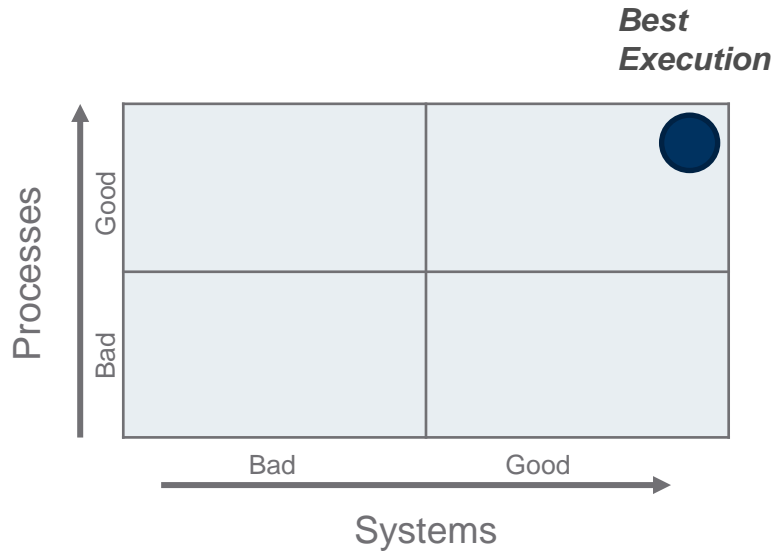
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Hi-Tech Industry Ecosystem

Techopedia - **High tech is an abbreviation of "high technology," which is a generic term referring to a broad range of industrial classifications and innovation.**

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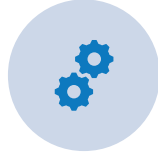
Unique Aspects of Hi-Tech

Best Execution

Processes — Good / Bad

Systems — Bad / Good

General Industries
Hi-Tech Industry

Business Disruptions

Business Disruptions

System & Process Changes

Systems Life Cycle

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Key Challenges

ABILITY TO SCALE RAPIDLY

CHANGING BUSINESS MODEL

THREAT OF COMPETITION

INSIGHTS FROM DATA

REGULATIONS

SUPPLY CHAIN DISRUPTIONS

GLOBAL EXPANSIONS

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Use Cases

- **Leading Mid-Size Mobile Device Management Company**
  - Changed from selling Perpetual Licenses to Subscription Model

- **Leading Network Device Manufacturing Company**
  - ASC 606 Revenue Implementation resulting in complete revamp front end and backend systems

- **Leading Large Social Media Company**
  - Grew 100X in 10 years in revenue

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Polling Question 3

What are unique challenges your company is facing?
(select all that apply)

a) Ability to scale rapidly

b) Custom processes

c) Threat of competition

d) Regulations

e) Change management

f) Others

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Polling Question 3 Results (Placeholder)

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Hi-Tech Industry – Business Applications

Key Elements and Tenants of Effective Systems

Elements

Business Model	**Business Process Flows**	**System of Record**
Automation	**Integration**	**Analytics**

Tenants

Innovation	**Velocity**	**Global**
Connected	**TCO**	

"Today's Effective Intuition is Tomorrow's Compulsion"

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Hi-Tech Standard Processes

Lead to Order
- Lead Conversion
- Deal Registrations
- Opportunity Management
- Quoting
- Configuration
- Order Creation

Order to Cash
- Order Booking
- Order Fulfillment
- Subscription Management
- Returns and RMAs
- Customer Billing
- Credit Memo
- Customer Payment
- Payment application

Project to Invoice
- Project Budget Creation
- Billing Events
- AR Integration
- Project Cost Budget
- Project Cost Capture

Revenue Management
- Revenue Contracts
- Revenue Processing
- Performance Obligations (POB)
- Revenue Reporting
- GL Integration

Source To Pay
- RFI/RFQ
- Vendor Selection
- Requisition
- Purchase Order
- Supplier Registration and Maintenance
- Receiving
- AP Invoice
- Payment

Ideation to Product
- Innovation
- Release Product
- ECO / ECR Mgmt.
- Approvals
- File Manager
- Create/Manage Item
- Create/Manage BOM
- Maintain Status
- Retire Products

Plan to Deliver
- Forecasting
- Demand Planning
- Sales and Operations Planning
- Supply Planning
- Order Promising
- Inventory Management
- Supply Chain Financial

Hire to Retire
- Employee onboarding
- Employee Management
- Talent Management
- Compensation Management
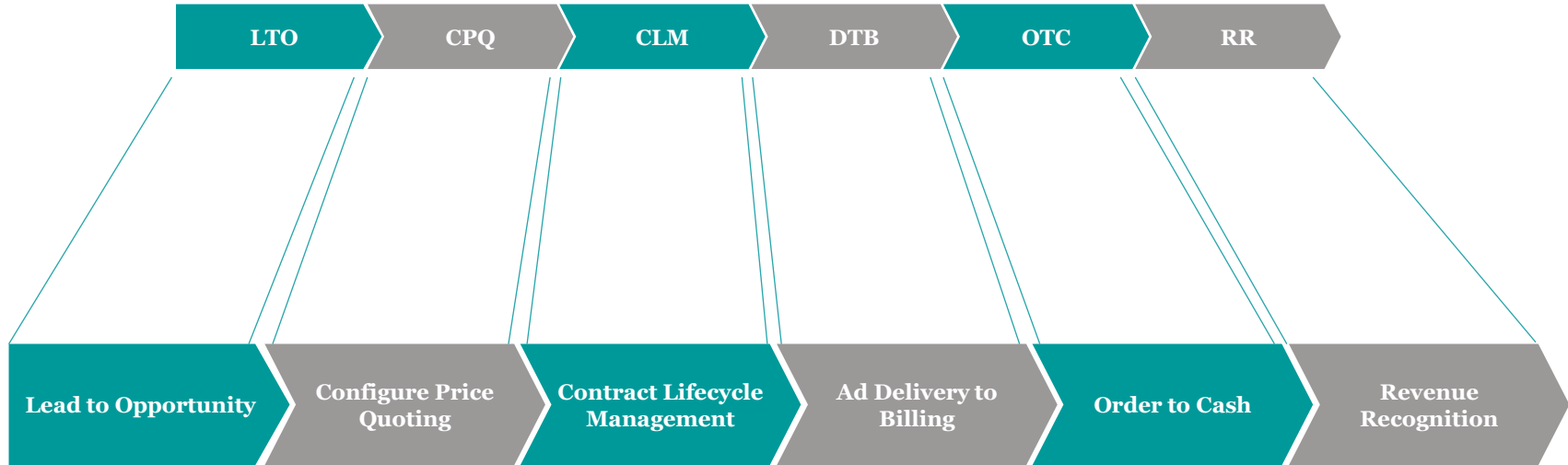- Payroll Management
- Benefits

Asset to Retire
- Assets Additions
- Asset Review
- Asset Adjustments
- Asset Retirements
- Depreciation
- Asset Transfer
- Asset Lifecycle Management

Record to Report
- Journal Imports
- Mass Allocations
- Translation
- Allocation
- Intercompany
- Consolidation
- Financial Reporting

End to End Processes will need Cross-Functional Handshake

Core Lead to Cash Process Flows

LTO	CPQ	CLM	DTB	OTC	RR

Lead to Opportunity	Configure Price Quoting	Contract Lifecycle Management	Ad Delivery to Billing	Order to Cash	Revenue Recognition

Customers Master Data
- Agencies
- Customers
- Publishers
- Users/Consumers

Communities Portal

Pricing
- Ads, Subscription products variables
- Discounting
- Integrate with ERP

Quoting:
- Quoting workflows

Configuration
- Guided Selling

Contracts
- Configurable and preapproved terms , conditions and templates
- Automating and accelerating contract lifecycle management from start to finish
- Standardizing and controlling contract development

Prebuilt Integration
- Integrates with Ad Server
- Best practice business processes for pre-billing and month end reconciliation

Orders
- Credit Check Processes
- Insertion Order Types (Planned and Event Based)
- Order Fulfillment Integration with Ad Server

Cash
- Advanced Collections

Compliance with ASC 606 Rules
- Integration with POB and Revenue Events
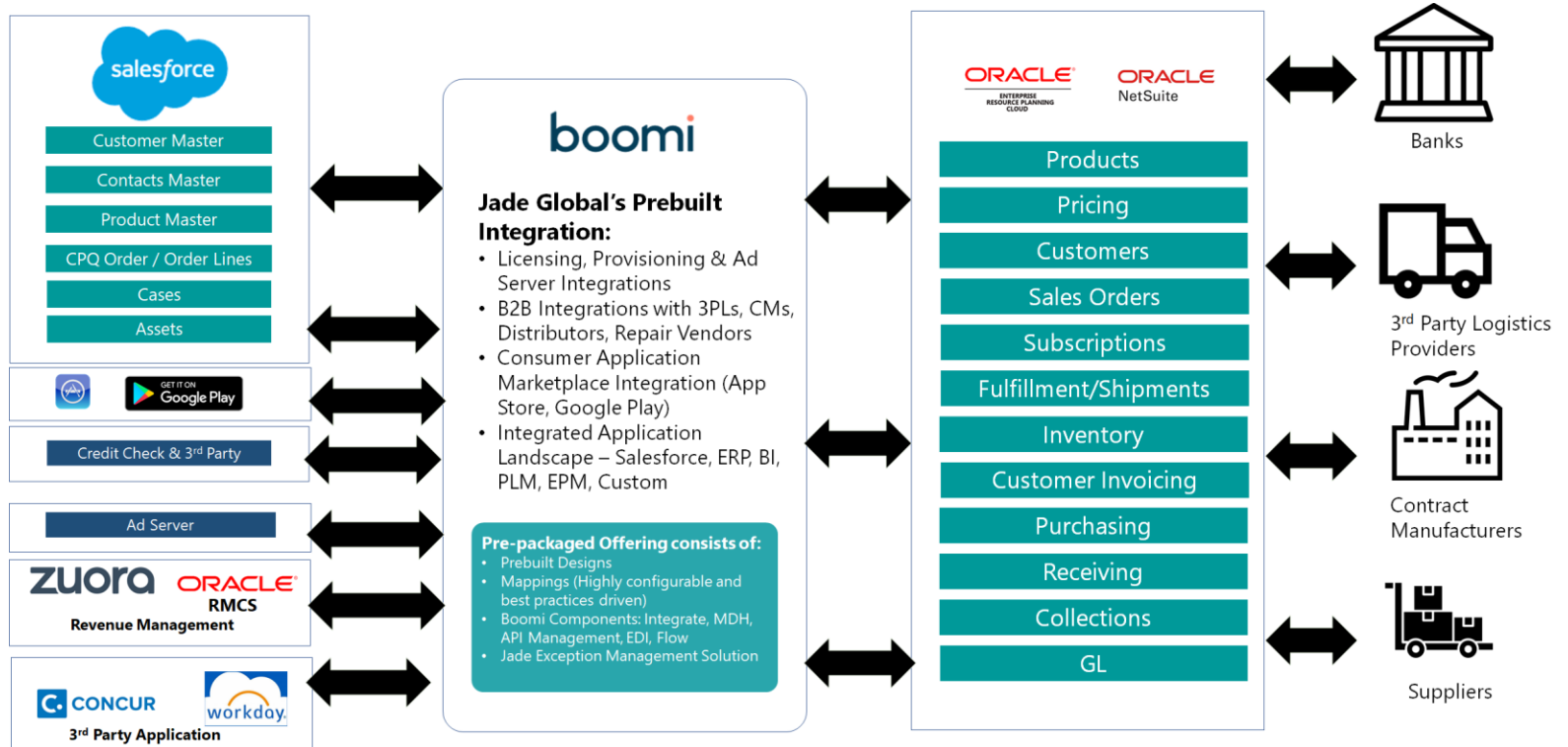- Revenue rules for Ads and Subscriptions

Sales Use Cases

	Use Case	Product	Additional Info	Software	Social Media	Network Devices	Semicon
1	New Order	Software License		Applicable	N/A	Applicable	N/A
		Hardware		N/A	N/A	Applicable	Applicable
		Service Contracts		Applicable	N/A	Applicable	N/A
		Subscription	Including usage	Applicable	Applicable	Applicable	N/A
		Professional Services	Including training	Applicable	Applicable	Applicable	N/A
2	Amendment	Software License		Applicable	N/A	Applicable	N/A
		Hardware		N/A	N/A	Applicable	Applicable
		Service Contracts		Applicable	N/A	Applicable	N/A
		Subscription	Including usage	Applicable	Applicable	Applicable	N/A
		Professional Services	Including training	Applicable	Applicable	Applicable	N/A
3	Renewals	Software License		Applicable	N/A	Applicable	N/A
		Service Contracts	Including usage	Applicable	N/A	Applicable	N/A
		Subscription	Including training	Applicable	Applicable	Applicable	N/A
4	Insertion Orders (IO)	Planned Order		N/A	Applicable	N/A	N/A
		One-time Order		N/A	Applicable	N/A	N/A
5	eCommerce Orders	Software License		Applicable	Applicable	Applicable	N/A
		Hardware		N/A	N/A	Applicable	N/A
		Service Contracts	Including usage	Applicable	N/A	Applicable	N/A
		Subscription	Including training	Applicable	Applicable	Applicable	N/A
6	Returns/Cancellations/Replacements	Software License		Applicable	N/A	Applicable	N/A
		Hardware		N/A	N/A	Applicable	Applicable
		Service Contracts		Applicable	N/A	Applicable	N/A
		Subscription		Applicable	Applicable	Applicable	N/A
		Professional Services		Applicable	Applicable	Applicable	N/A
7	Revenue Sharing	Data Licensing		N/A	Applicable	N/A	N/A
		Developer/Publisher	Revenue Share	N/A	Applicable	N/A	N/A
8	Marketplace Sales	App Store		Applicable	N/A	N/A	N/A
		Google Play		Applicable	N/A	N/A	N/A
		AWS Marketplace		Not Applicable	N/A	Applicable	N/A

Additional Considerations:
- **Direct Orders**
- **Partner Orders**
  - Distributor
  - Resellers
- **Global**
  - Multicurrency
  - International Use Cases
- **Pricing and Discounting Include**
  - Tiered Pricing
  - Volume Discounting
- **Quoting Approvals**
- **Product Options**
  - Configure to Order (CTO)
  - Assemble to Order (ATO)
  - Pick to Order (PTO)
- **Credit Check Process**
- **Export Compliance**
- **5 Reference architectures**

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Functional Architecture

Solution Screenshots – Applications (Hi-Tech)

Preconfigured – Oracle Cloud Financials

Preconfigured – Oracle Cloud ERP RMCS

Preconfigured – Oracle NetSuite

Solution Screenshots – Analytics (Hi-Tech)

Preconfigured – PPM Processes

Net Forecast By Period

Preconfigured – Analytics

Excess and Obsolete Inventory Solution

Key Analytics & Robotic Process Automation
- *Sales & Marketing Analytics*
- *Operational Analytics*
- *Project Analytics*
- *Finance and Revenue Analytics*
- *HR Analytics*
- *Planning Analytics*
- *Service Analytics*

Summary

1. Broader definition of the hi-tech industry.

2. Key industry challenges and use cases.

3. Evaluate your organization's end-to-end business processes.

4. Understand the core business process and complexities

Polling Question 4

How standardized are your business processes?

a) 80% or more are standardized

b) 50-79% are standardized

c) 30-49% are standardized

d) Less than 30% are standardized

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Polling Question 4 Results (Placeholder)

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Questions & Answers

Use the **Q & A Panel** *to send your questions to our panelists.*

Steve Shannon

Director of Partnership Marketing,
Business Development
IMA

Raja Sekhar, PMP, Six Sigma Blackbelt,
PLD from Harvard

Vice President, Enterprise Solutions &
Hi-Tech Industry Vertical Leader
Jade Global

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Thank You to Our Featured Presenter!

Raja Sekhar, PMP, Six Sigma Blackbelt, PLD from Harvard

Vice President, Enterprise Solutions &

Hi-Tech Industry Vertical Leader

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Final Reminders

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- On your screen
- Evaluation Survey icon at the bottom of your console

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  <u>or</u>

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▶ Please print a copy of the CPE certificate for your records.

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