



S SOFTWARE M METHODOLOGY G GROUP

P A R T N E R S I N G R O W T H



## Project Management + Process Improvement

- Project Lifecycle Ownership
- **KPI Scorecards**
- **Compliance & Audit**
- Strategy & process formulation
- **Process Improvement Initiatives**
- Program Dashboards viewed from mobile device

## Information Technology

- **Application road mapping**
- Infrastructure, network, & telephony projects
- Software development & testing
- Vendor management
- **Cybersecurity**  
Multifactor authentication implementation (MFA)  
BitSight score rate increase strategies

## Digital + Ecommerce

- **CRM & CPQ**
- Web, Mobile, & Digital solutions including integrations and automation

## Business Intelligence

- **Report Development**
- Data Analytics
- **Data Science** + Machine Learning

## Professional Services

- **Highly effective & scalable PS resources**
- Excel at leading clients to success by navigating complex relationships and difficult situations

## Communications, Marketing & Branding

- **Created IT Organization Brand for New CIO**
- Creation & Management of communications
- Global communications across multiple languages
- Town Halls & Department Newsletters

**High Visibility + Must Succeed Projects**

## WHY US

- **You are not A Client, You are THE Client.**  
Because we are a boutique consulting firm, we can dedicate the same level of care and attention to your goals as our own business objectives.
- **100% Client Retention**  
We have retained 100% of our clients through the last 5 years!
- **No Brain Drain**  
We have 83% talent retention of our staff in the last 5 years; additionally, we have over 25 years experience in the industry!
- **You Call, We Answer**  
Our availability and focus on your goals is one of our greatest strengths!

- **CYBERSECURITY**
- **COMPLIANCE & AUDIT REMEDIATION**
- **MFA IMPLEMENTATION**
- **KPI SCORECARD**
- **PROCESS IMPROVEMENT INITIATIVE**
- **PROGRAM DASHBOARD**
- **BUSINESS INTELLIGENCE**
- **ORGANIZATION BRANDING & COMMUNICATIONS**
- **APPLICATION ROADMAP**

## BENEFITS REALIZED

- **Visibility**
- **Better Decision Making**
- **Data Security**
- **Effective Processes**
- **Business Alignment**



**Nilu Safdarian**  
Chief Executive Officer

940.206.3295  
nilu@smgsvcs.com

## BACKGROUND & OBJECTIVE

This client needed an entire Cybersecurity strategy and roadmap to (1) increase their BitSight score rating which was at a failing mark and causing challenges with receiving business insurance, and (2) develop an incident response process to comply with the SEC proposed rules.

## APPROACH

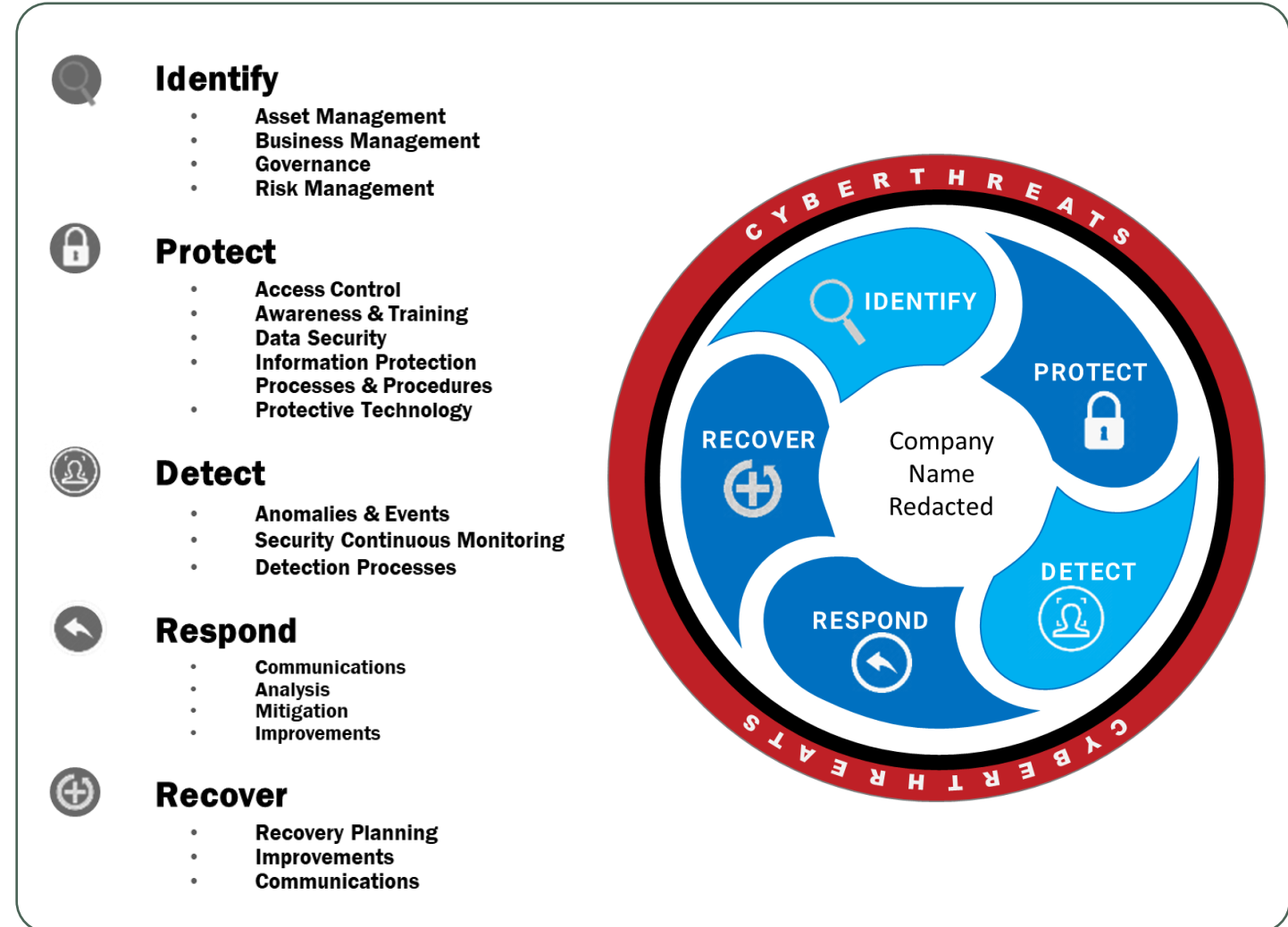
We partnered with the client's CISO to develop a multipronged strategy which included the following elements:

- Risk Identification
- Risk Mitigation
- Response and Disclosure
- Governance
- Roadmap

## BENEFITS REALIZED

- ✓ A Cybersecurity strategy that aligned with the aligned with the national institute of standards & technology (NIST) cyber security framework (CSF)
- ✓ BitSight Score increased from Basic to Advanced in 6 months time!
- ✓ Extremely Happy Board of Directors & CIO!

*Cybersecurity Strategy Developed for Client*



## BACKGROUND & OBJECTIVE

On a recent audit, this client received a failing grade of “2-Defined-controls are designed but not properly executed” in the key area of monitoring. They needed to rapidly increase their score to a “3-Implemented-controls are effectively designed and executed” in order to retain key clients.

## APPROACH

We designed a 3 step process to:

- (1) Identify the areas of opportunity
- (2) Resolve the issues via a customized remediation plan
- (3) Optimize with a repeatable action plan going forward to maintain the results

## BENEFITS REALIZED

- ✓ Their next audit scored a “4 – Integrated” rating! The auditors were impressed and stated this was “an efficient and sustainable process of embedded controls.”
- ✓ We created a repeatable process for this client so they could maintain the great results going forward

## CMMI RATE IMPROVEMENT

Sample Scorecard during Remediation

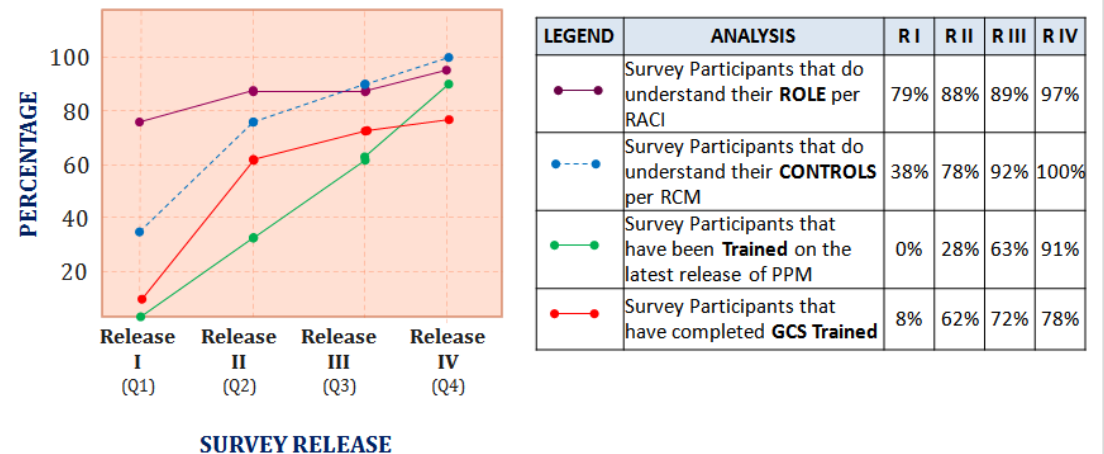
Total % Complete = 72%

% Complete by Process Area	
Process Area	%
Governance	76%
Disaster Recovery	67%
Security	94%
Service Mgmt	51%

SECTOR	PROCESS AREA	ROLE	OWNER	STATUS
AMEA	Security	Database Control Owners	<Name>	Complete
AMEA	Security	Unix Control Owners	<Name>	Complete
AMEA	Security	Windows Controls Owners	<Name>	Complete
EUR	Service Mgmt	Incident Manager	<Name>	
EUR	Service Mgmt	Problem Manager	<Name>	
EUR	Service Mgmt	Change Manager	<Name>	Complete
EUR	Disaster Recovery	Sector DR Lead	<Name>	
LA	Disaster Recovery	Sector DR Lead	<Name>	
Global	Governance	Global Finance Lead	<Name>	Complete
Europe	Governance	Sector Finance Leads	<Name>	Complete

Report from Survey Data Results

### - Summary of Progress Improvement -



## BACKGROUND & OBJECTIVE

This was a high visibility, aggressive timeline project that came straight from the board of directors. This project had to be done in 90 days and could not fail as the biggest investor threatened to pull out if MFA was not implemented immediately (in order to maintain business insurance).

## APPROACH

Since this was such a critical project, we took an aggressive approach:

- Business executives were directly responsible for their team's tasks
- Daily scrum with business executives (Director and up level)
- Twice weekly status updates to the CIO
- Risk/Issues were escalated and resolved immediately

## BENEFITS REALIZED

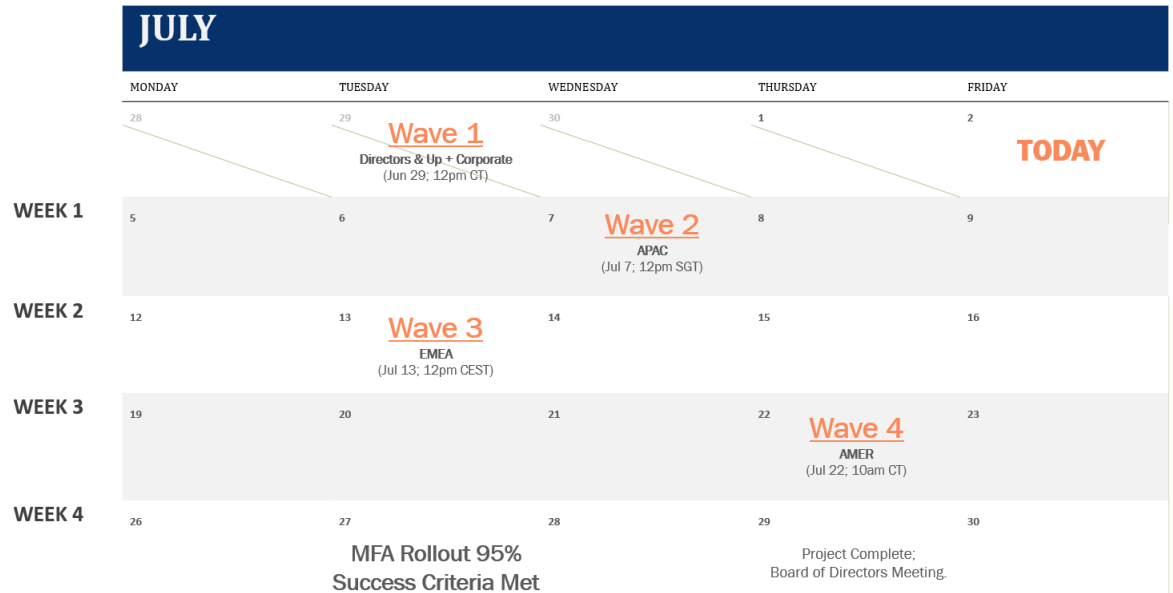
- ✓ Company data now secure
- ✓ Retained key investor for company

### Daily Scrum Agenda

#### SAMPLE DAILY SCRUM AGENDA

- ✓ FAQ Sheet sent to HR managers, Plant managers, & Directors & Up
- ✓ Wave 1 Complete
- Waves 2, 3, & 4 before end of this month
- Gain team alignment on 95% Success Criteria
- Discuss post go-live wave to capture difficult use cases
- Align on next step action items

#### CALENDAR



## BACKGROUND & OBJECTIVE

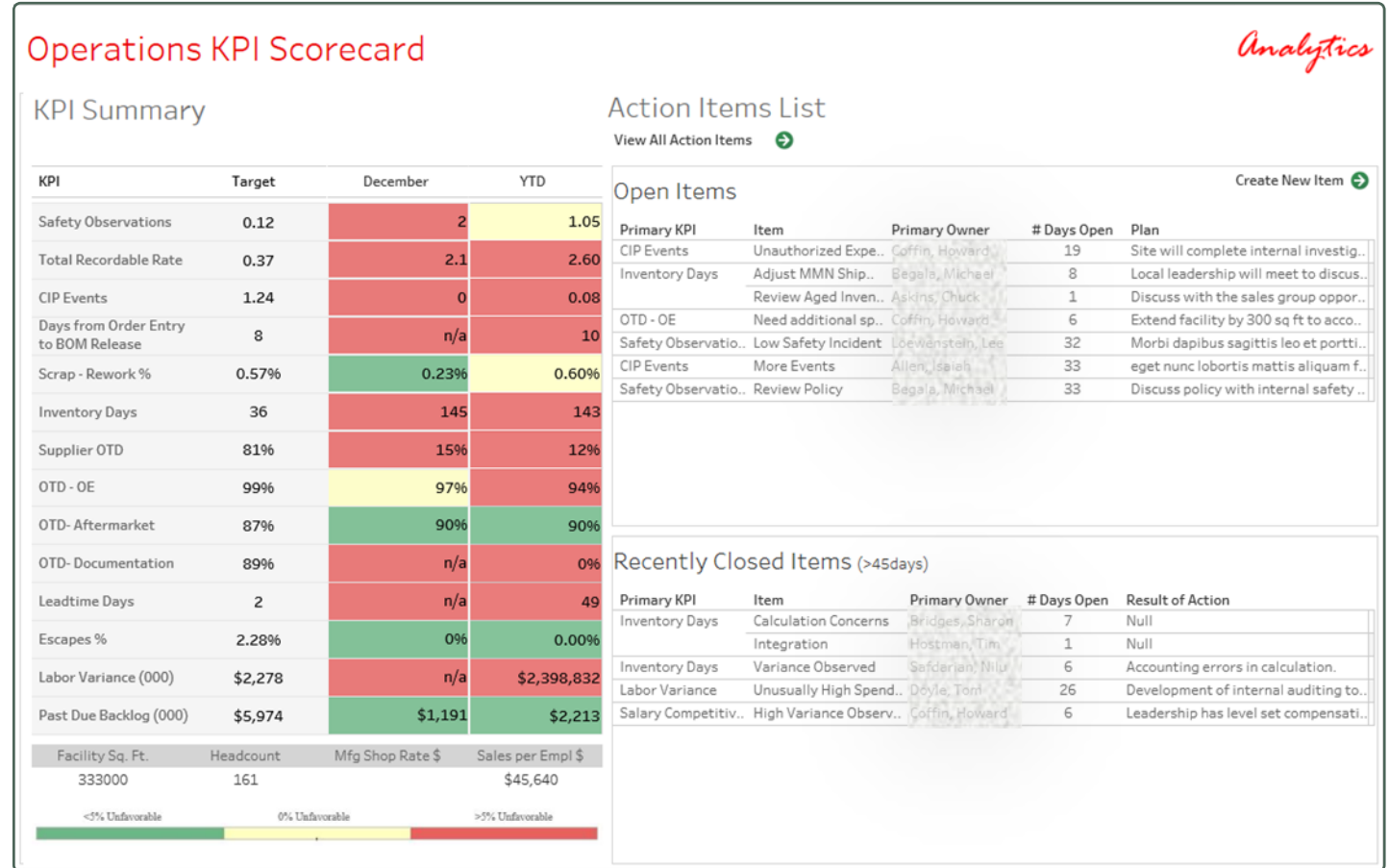
This project came straight from the CEO with an aggressive 90 day timeline from concept to an operational KPI scorecard. The report needed to be crisp, clean, with real time live data for the executives to consume.

## APPROACH

Everything had to be created bottom up from what KPIs to capture, calculations needed, location and in some cases new collection of source data, to development of a report visualization tool (in this case Tableau).

## BENEFITS REALIZED

- ✓ KPI's created to monitor the Operations space
- ✓ Real time tracking into the state of affairs
- ✓ Guidance gained on where to focus costs and energy for maximum benefit



## BACKGROUND & OBJECTIVE

This CIO was concerned about the bad blood between his IT organization and their commercial business partners. The business was frustrated with the lack of processes and clarity on the status of their project and enhancement requests. The IT team was constantly frustrated due to lack of clarity on the priorities and unrealistic timeline expectations from the business.

## APPROACH

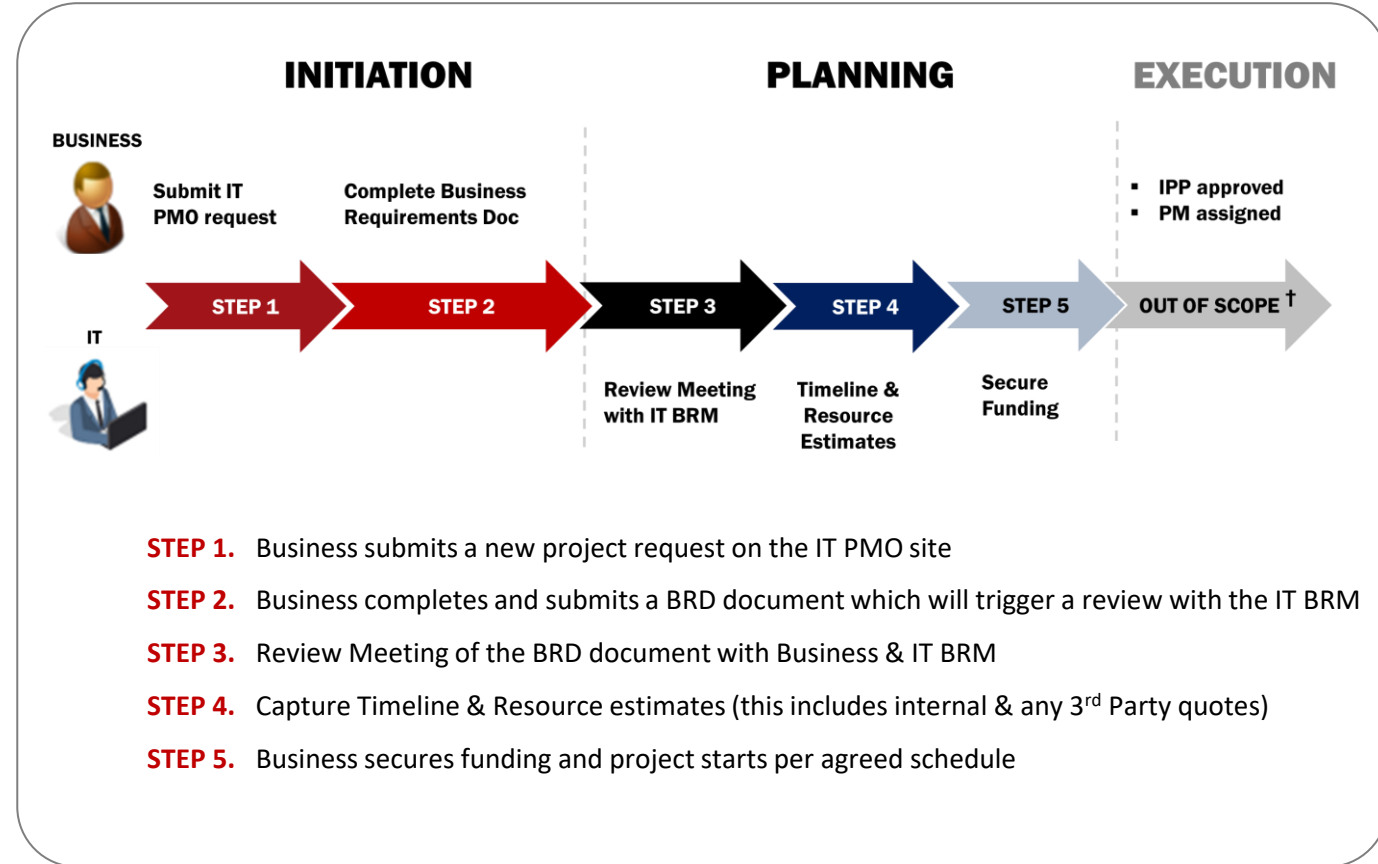
This project was as much about building a communication bridge between IT and business as it was about implementing a process to capture business demand. To resolve these issues we:

- Captured the pain points from both the business and IT
- Gained buy-in from all parties as to the process going forward
- Setup regular checkpoints and status updates to keep all parties aligned going forward

## BENEFITS REALIZED

- ✓ Mutual respect between IT and business
- ✓ Demand Process in place to efficiently capture business demand and effectively work demand based on business priority

*New Demand Intake Process*





## BACKGROUND & OBJECTIVE

This client needed to see all their projects, dependencies, and the current status in one easy to access location.

## APPROACH

- We used Smartsheet as the project management tracking tool and built a custom dashboard tailored to the information this client wanted to see
- We built the dashboard to be easily viewed from a mobile device so leadership could easily access and view the information in real time

## BENEFITS REALIZED


- ✓ Visibility into all projects & dependencies
- ✓ Easy to access live dashboard viewed via a mobile device!

### All Projects DASHBOARD

**All Projects**

**28%**  
Percent Complete

**Project Financials**



- Current Burn
- Total Cost at Complete
- 3 Year ROI

[Link to Resources](#)

Project Plan

SharePoint

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#### TIMELINE

Task	Start Date	End Date	% Complete	Timeline															
				Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Product Upgrade	05/18/20	09/23/20	100%	Product Upgrade															
Oracle Upgrade	08/13/20	01/15/21	25%	Oracle Upgrade															
Application Feasibility project	09/14/20	03/01/21	12%	Application Feasibility project															
Data Cleansing R1	06/29/20	02/08/21	35%	Data Cleansing R1															
New Datacenter Rollout	07/01/20	06/15/21	27%	New Datacenter Rollout															
Audit Remediation project	03/02/21	07/30/21	0%	Audit Remediation project															

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#### PROJECT TASKS

**PAST DUE**

Task	% Complete	Start Date	End Date	Lead	Comment / Action Item

**UPCOMING**

Task	% Complete	Start Date	End Date	Lead	Comment / Action Item
Choose upgrade dates	50%	Oct 12, 2020	Oct 16, 2020	Nilu Safdarian	
Finalize Project Plan	0%	Oct 19, 2020	Oct 20, 2020	Nilu Safdarian	
Schedule checkpoint meetings	0%	Oct 19, 2020	Oct 23, 2020	Nilu Safdarian	

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#### PROJECT HEALTH

**ISSUE LOG**

Issue Title	Issue Description	Issue Resolution Plan	Target Resolution Date	Issue Owner	Status	Closed Date

**RISK LOG**

Risk Title	Risk Description	Risk Mitigation Plan	Target Resolution Date	Risk Owner	Severity	Closed Date
Compatibility issues that could break current functionality		Cloud Ops to provide changes from 11g/12c to 19c and prepare Engineering for any potential code changes	Nov 30, 2020	Nilu Safdarian	High	Jul 15, 2020
Potential issues with Spend Manager DB Upgrade	TBD: Need to define the issues that came out of the last upgrade, make sure there are test coverage on it		Oct 30, 2020	Nilu Safdarian	Medium	
Not enough QA resources to handle Upgrade initiatives		Ask Support to help with some testing (particularly Spend Manager)	Dec 31, 2020	Nilu Safdarian	Low	

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## BACKGROUND & OBJECTIVE

This client's stakeholders needed to consolidate their data from different systems and business units into one central location in the cloud so they could slice and dice the data for better decision making. A broad range of stakeholders from the Quality to Sales teams needed to use the same data for their respective areas.

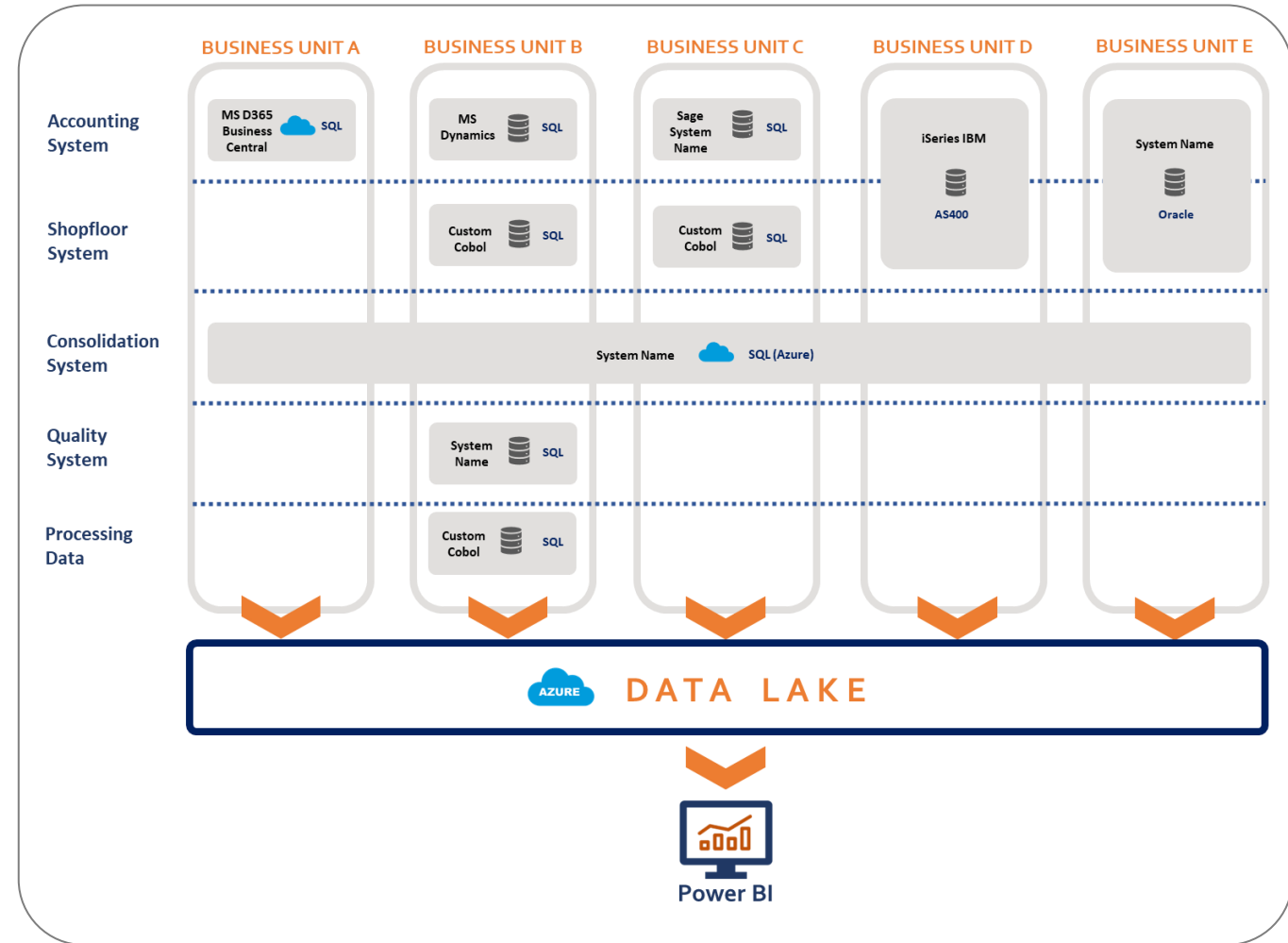
## APPROACH

- 1) Capture source system data into an Azure data lake
- 2) Build a capture and delta load process
- 3) Partner with stakeholders to understand their specific needs
- 4) Build reports

## BENEFITS REALIZED

This project was very successful and the stakeholders were overjoyed with the visibility they now had. Example) The VP of Quality wanted to understand why product quality issues began showing up in the manufacturing process. Through this exercise he was able to determine a correlation between certain raw material vendors and product quality issues which allowed him to easily modify suppliers to return product quality to acceptable levels. As the word got out across the company other business leaders were excited to build reports off the same data repository.

*Capturing of Source System Data in the Cloud for Business Consumption*



## BACKGROUND & OBJECTIVE

A new CIO wanted to create an IT brand, elevate the level of communications coming from IT, and inject excitement and pride in the IT organization. Previous communications consisted of long boring text, were ignored by the audience, and didn't instill confidence across the company globally.

## APPROACH

This was a lot of Fun doing! Our approach consisted of:

- Engaging and well written communications from IT (including pictures and concise messaging)
- New format for IT Townhalls by adding a people focus, outside guest speakers, and audience participation
- Monthly IT newsletter highlighting a person and project in the organization
- Fun ways of rebranding the IT organization like MS Teams photos using Avatars

## BENEFITS REALIZED

- ✓ Increased IT credibility & authority with business globally
- ✓ Skyrocketed moral within the IT Organization!
- ✓ IT content that is read and consumed by target audience

*IT Organization Branding + Communication Strategy*

Opportunity	Benefits	Audience	Frequency
ELT Deck	High-quality Executive updates in content & presentation	Executives	Monthly
IT Townhall + Survey	Communication across the Organization	IT Org	Quarterly
Coffee Talk social with CIO	Fun way to connect and feel the pulse of the Organization Marketing tool to increase IT survey participation	Start with IT	Quarterly
Newsletter	Increase IT credibility & authority with business globally Provides more detailed content Draws stronger engagement	Enterprise wide (Global)	Monthly
Engaging Communications	Provides important IT messaging and content that is consumed by target audience	Enterprise wide (Global)	As needed

*Example Communication of Posters made for Client for Cybersecurity Month in October*



Example IT Posters

## BACKGROUND & OBJECTIVE

Over years of acquisitions and mergers, this client's application landscape was fragmented and complex. They needed both visibility into and streamlining of their footprint.

## APPROACH

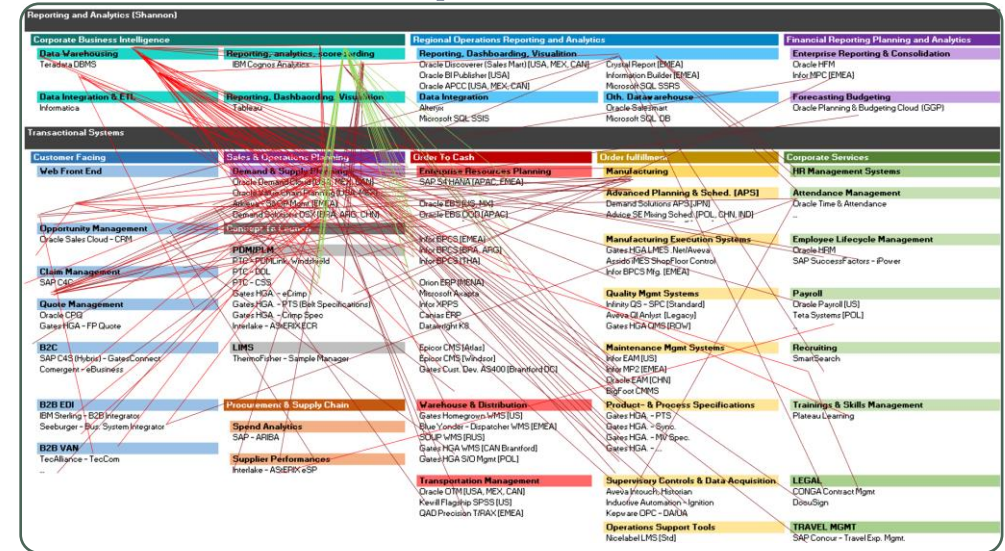
This complex project involved a 2 step approach:

- (1) Gain visibility into the current landscape.** This effort required a lot of collaboration and 1:1 working sessions with leaders and SME's across the IT organization to document the tribal knowledge.
- (2) Reduce the complexity** of the landscape by streamlining where possible.

## BENEFITS REALIZED

- ✓ Gained Application Landscape Visibility
- ✓ Reduced footprint complexity
- ✓ Set Landscape up for future growth & expansion

Footprint BEFORE



Footprint AFTER

