



PHASE 1: EMPOWERING INFORMED DECISIONS

# Continuum Program



# About Altera Partners

## Who We Are

- We are a team of experienced and seasoned veterans, most with over 25+ years of experience across diverse industries and technologies, including SAP, Oracle, NetSuite, Salesforce, ServiceNow, Atlassian, and more. We pair with the innovative spirit and agility of the next generation to deliver the desired results.

## Our History of Delivering Value

- 300+ ERP projects including implementations and migrations
- Pioneers in key milestones: implemented some of the very first SAP, Oracle and Salesforce implementations.
- 20+ years of AI/ML

## Our Services

- ERP & Business Operations
- Business & Tech Strategy
- AI & Digital Transformation
- Data Management
- Supply Chain
- M&A
- Managed Services (on-shore, near-shore, off-shore)

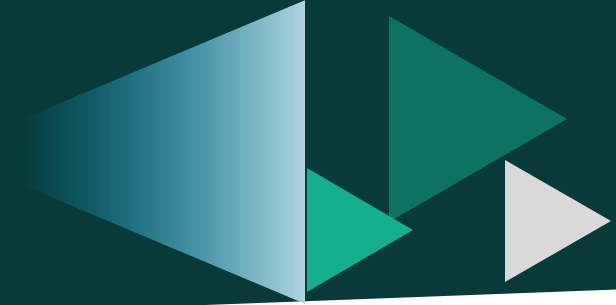
*Some of our best work in the past are at places you know:*



# Many Organizations Are Feeling Pressure

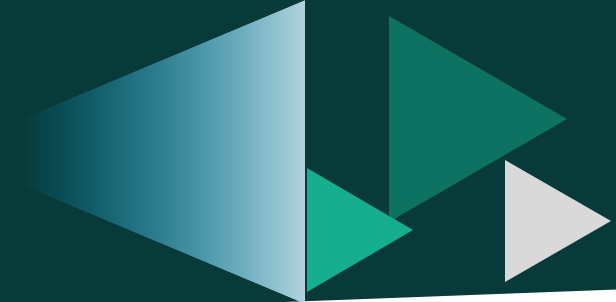
- **Vendor Pressure:** ERP providers are aggressively pushing customers from perpetual licenses to SaaS subscriptions, using the end-of-support for legacy systems as leverage. They claim that true modernization requires moving to their latest SaaS platforms—a message that’s only partially true.
- ***"If It's Not Broken, Don't Fix It"***: Many ERP systems have run reliably for decades, leading to understandable hesitation around full-scale replacements. Leaders are cautious about investing in costly migrations without clear ROI or business upside.
- **High Costs and Risks:** : SaaS migrations are often expensive, disruptive, and force a shift from CapEx to OpEx. And because many are “lift-and-shift” efforts, they don’t deliver immediate business improvements - just added complexity.
- **Peer Pressure + AI Confusion:** Companies often feel pressure to act - whether because competitors are modernizing or because they feel they should be “doing something with AI.” But without a clear strategy, many of these AI and SaaS experiments have failed to deliver results.

# Let's Pause, Assess, Strategize



- **Step Back:** Avoid being pushed into a decision without thorough analysis.
- **Neutral Expertise:** Leverage a trusted third party to evaluate all paths objectively.
- **Really Know Your Options:** Gain clarity on every viable path, from modernizing in place to exploring SaaS solutions.
- **Customized Strategy:** Build a plan tailored to your organization's specific needs and goals.
- **Balanced Approach:** Address immediate pressures while planning for sustainable growth.

# Building an Informed Strategy



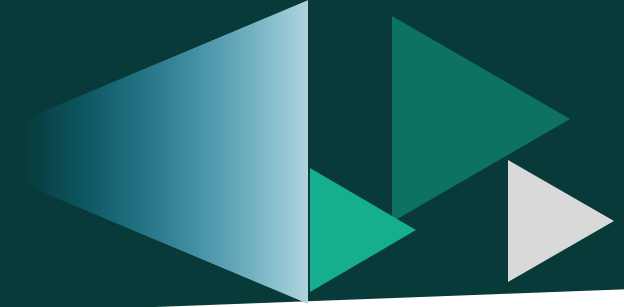
- **Objective Assessment:** Evaluate the current ERP environment to identify opportunities to either modernize or optimize; or both.
- **Strategic Guidance:** Provide clarity on the costs, risks, and benefits of all modernization options.
- **Due Diligence:** Ensure every decision is backed by data and expertise.
- **Empowered Choices:** Provide the confidence to invest where it matters most.

# Understanding Costs and Complexities



- **Vendor-Driven Change:** Migration to SaaS often requires new licenses and reimplementation.
- **Cost Implications:** High initial investment and ongoing Opex increases.
- **Time-Intensive Process:** Typical migrations take years to complete.
- **Operational Risks:** Potential rework and misalignment with existing processes.

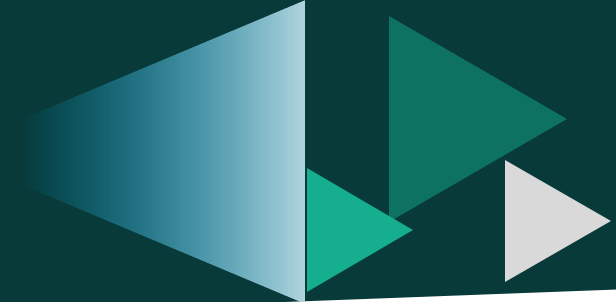
# Option: Move to The Vendor's SaaS



- **Access to Innovations:** Leverage the latest technologies like AI, machine learning, and advanced analytics available exclusively on SaaS platforms.
- **Scalability:** SaaS solutions are designed to grow with your business, providing flexibility and robust infrastructure.
- **Reduced IT Overhead:** Eliminate the need for on-premise hardware, maintenance and/or PaaS, streamlining IT operations.
- **Continuous Updates:** Benefit from automatic updates and ongoing enhancements without manual intervention.
- **Improved Integration:** Seamless connectivity with other cloud-based tools and platforms.



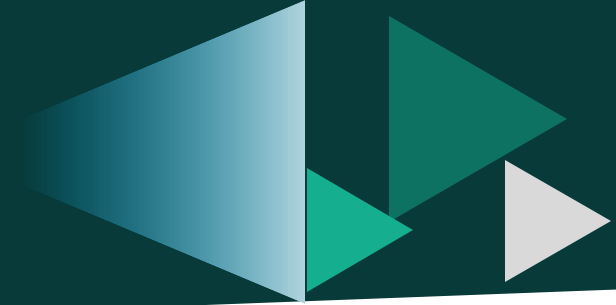
# Option: Modernize in Place



- **Modernize Selectively:** Retain the strengths of your current system while adopting targeted innovations.
- **Cost Savings:** Shift to 3rd party support to reduce maintenance fees by 50%+.
- **Flexibility:** Invest in areas with the highest ROI, such as AI-driven tools or process automation.
- **Longevity:** Sustain your current ERP environment for 15+ years while staying competitive.
- **Low Risk:** This approach minimizes disruption, avoids major system overhauls, ensures stability for ongoing operations, and provides the fastest ROI.

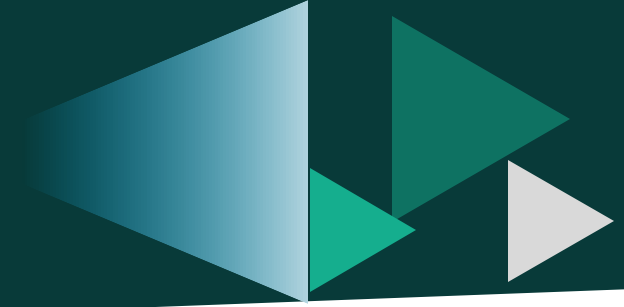


# Modernizing with AI Agents



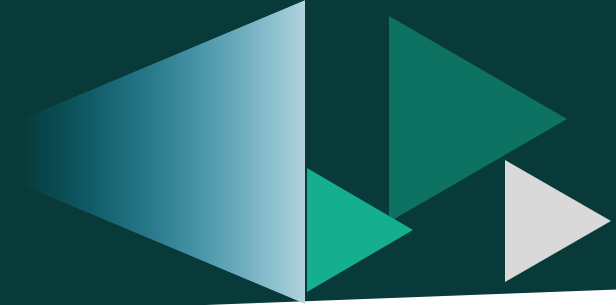
- **Capabilities:** AI Agents are available now and can perform tasks such as predictive analytics, process automation, and intelligent decision support across departments.
- **Examples:**
  - **Finance:** Automate invoice processing, predict cash flow, and detect anomalies and fraud.
  - **Supply Chain:** Optimize inventory levels, enhance demand forecasting, and streamline logistics.
  - **Customer Service:** Provide personalized responses, handle routine inquiries, and escalate complex issues to human agents.
- **Scalability:** Deploy AI agents across various business functions to drive efficiency and innovation.
- **Outcome:** Empower your organization with intelligent tools that improve accuracy, speed, and customer satisfaction while reducing manual effort.

# The Continuum Process



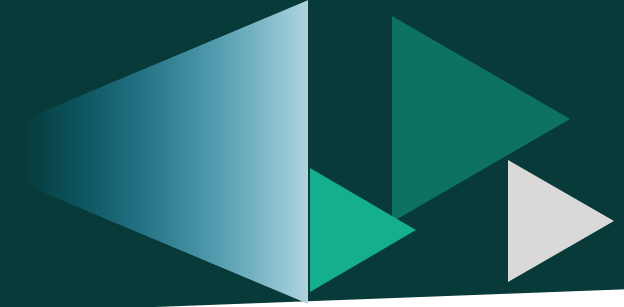
- **Multi-Faceted Assessment**
  - **People:** Workshops/interviews with stakeholders
  - **Process:** Environment configuration & and transactions
  - **Data:** Business and Financial Data
- **Documented Opportunities (based on Assessment)**
  - Process improvements within current environment
  - Modernization technology (e.g. AI Agents)
  - New and/or replacement applications
- **Financial Model**
  - Multiple Options
  - Total Cost of Ownership
  - Cost of Change
- **Recommendation**

# Why Partner with Altera Partners?



- **Informed Decisions:** Gain clarity through unbiased, expert assessments.
- **Minimized Risks:** Avoid costly missteps by exploring all options.
- **Strategic Value:** Focus on modernization that drive measurable outcomes; the entire business or selected areas.
- **Trusted Partnership:** Work with advisors committed to your long-term success.

# Timeline and Costs



**Average Program duration is 45-90 days\***

**Average Program cost is \$60-100k\***

*(\* depending on complexity of environment)*



**INFORMED  
DECISIONS**



**MINIMIZED  
RISKS**



**STRATEGIC  
VALUE**



**TRUSTED  
PARTNERSHIPS**

# Questions?

# Thank You

Let's work together to explore your options  
with confidence and clarity

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- **INFO@ALTERA.COM**
- **ALTERA.PARTNERS**