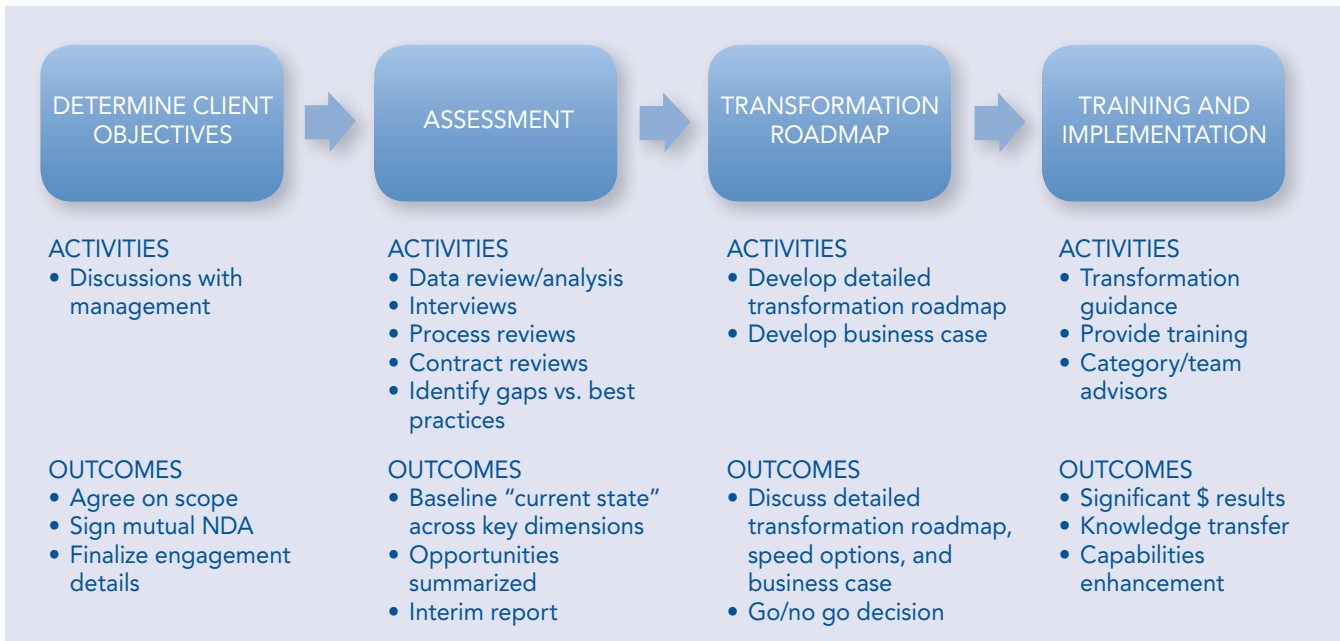


# Opportunity Assessment and Transformation Roadmap



## Overview

Transforming your supply chain and procurement processes requires a well-constructed roadmap that allows your organization to clearly see the path to the future. Greybeard's Opportunity Assessment and Transformation Roadmap is a plan that puts your organization on the road to:

- **Short-term cost savings**— building momentum, credibility, and buy-in for change
- **Long-term improvement** — building your organization's ability to achieve and sustain results on its own.

An initial pre-assessment helps establish an understanding of your organization's goals and objectives before work begins.

## Assessment

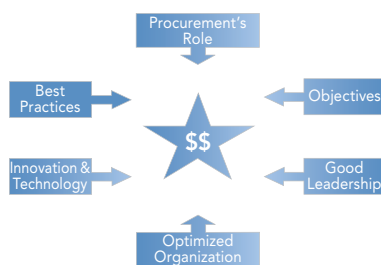
To develop an effective roadmap for transformation, we must begin with an accurate assessment of where your company stands.

The Assessment phase is divided into two distinct stages:

- Current state assessment
- Opportunity assessment.

### Current State Assessment

In this stage, Greybeard performs an objective, comprehensive assessment of the current state of your organization's procurement and supply chain management activities. We review current practices against best practices, and compare your performance against benchmarks in such areas as policy, processes, skills, and objectives, using Greybeard's "Star Chart" transformation framework (below).



## Opportunity Assessment

Once the current state is analyzed, attention turns to identifying the opportunities that exist. In this stage of the Assessment process, we detail and quantify potential opportunities by category of spend, and clearly prioritize future initiatives.

### Typical Assessment Activities

Typical activities during the Assessment phase include:

- Interviews with key personnel
- Reviews and analysis of processes, contracts, and data
- Baseline "current state" defined across key dimensions
- Comparison of current practices to benchmarks and best practices
- Estimate of cost-saving opportunities by category of spend
- Description and estimate of other opportunities, such as working capital improvements and revenue enhancements.

*Please turn to reverse side.*

# Opportunity Assessment and Transformation Roadmap

## Transformation Roadmap

The Transformation Roadmap describes an achievable path to the future — a detailed guide to realizing the opportunities identified in the assessment.

This Transformation Roadmap will create momentum, build organizational capabilities and support, and drive superior performance over the long term.

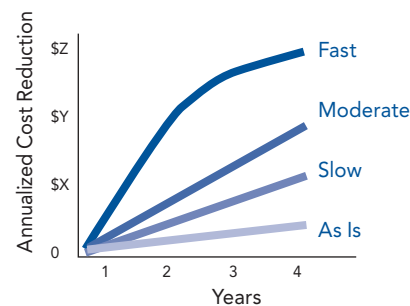
Greybeard's advisors carefully sequence the Roadmap's elements so that each new step builds on the others. This is part art and part science — a skill where our deep experience is instrumental to our clients' success.

A comprehensive Transformation Roadmap typically addresses:

- Estimated cost savings
- Recommended goals and objectives
- Policy and process improvements
- Training and skills development
- Governance structures
- Organizational design options
- Transition considerations
- Resources required.

## Roadmap "Speed" Options

We typically develop Roadmaps for three potential "speeds" of transformation — fast, moderate, and



## CASE HISTORY

For one recent Greybeard client, the Opportunity Assessment and Transformation Roadmap identified tens of millions of dollars in potential savings — and exactly how to achieve it. Convinced of the potential savings Greybeard identified, the client elected to double their strategic sourcing staff and pursue a "fast" transformation path with our guidance. The result? The Chief Financial Officer singled out this initiative for contributing significant bottom line results in its first year. And in the face of a difficult business environment, this client was able to use procurement transformation to gain an edge over the competition.

slow. This allows your organization to see how quickly results can be achieved with various resource allocations, and helps you select the pace that's right for you.

## Building the Business Case

All the planning in the world makes no difference if you cannot build a business case that convinces senior executives of the tangible benefits of the transformation and thus gain approval and resources to proceed.

Greybeard's experience and perspective on state-of-the-art supply chain management will help you build a solid, well-reasoned business case — including a solid forecast of expected ROI. We can even assist you in making this critical presentation — a role we've performed for many clients.

## Training and Implementation

Once the Roadmap is complete, Greybeard's Training and Implementation services can help you turn the vision into reality.

As with all Greybeard services, training and implementation are conducted by practitioners with real-world experience — not newly minted MBAs. Our advisors have "been where you are" — and faced the same kinds of sourcing challenges that you and your people do every day. As a result,

even the most skeptical employees quickly recognize the credibility of the advisors, the relevance of their anecdotes, and the quality of the training and mentoring.

## Why Choose Greybeard

Clients consistently tell us that we deliver a much better ROCI ("return on consulting investment") than conventional consulting firms. How do we accomplish this?

- **The Return:** We help clients deliver better results sooner, because our advisors have been real-world practitioners, not just consultants.
- **The Investment:** Our advisory fees are reasonable, nowhere near the levels charged by conventional consulting firms.

This combination of experience and practical focus yields results faster with a smaller investment — so you gain greater results at lower cost.

## ABOUT GREYBEARD ADVISORS

Greybeard Advisors is a leading provider of advisory services, including professional training and mentoring programs, for procurement and supply chain management.

To learn more, visit:  
[www.GreybeardAdvisors.com](http://www.GreybeardAdvisors.com)