High-Technology Marketing Consulting

Callan Consulting

Host Analytics Solution Deployment

A Guide to Tasks, Timeline and Required Resources

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Executive Summary

For Host Analytics customers and prospects, the solution deployment represents both the final stage of the purchase process and the initial stage of its actual use to manage their consolidation and budgeting. It is important to make this process as quick and painless as possible, both to shorten the time to value, and to minimize the cost to the organization in terms of staff time required.

To date, Host Analytics has performed hundreds of customer deployments. It has leveraged the learnings from these engagements to develop a proprietary methodology to ensure that deployments can be performed as quickly and painlessly as possible.

This methodology consists of four phases:

- **Initiate.** This phase focuses on introducing the customer team to the Host Analytics methodology, gathering customer business requirements, and providing training on the solution.
- **Design.** During the Design phase, the project team codifies business requirements, builds a detailed project plan, and configures the Host Analytics instance to support development.
- **Execute.** During this phase the team performs specific development tasks, populates the Host Analytics system with customer data, and performs validation for the application.
- **Close.** During the Close phase the team closes outstanding development items and prepares for handoff to the Host Analytics Support organization and go live for the customer.

The project team consists of staff from both Host Analytics and the customer organization. On the customer side, the project team consists of staff from the Finance/Accounting organization, and could include financial analysts or budgeting and planning managers, with oversight provided by a Controller or CFO. Combining Host Analytics and customer personnel leverages the in-depth product knowledge of the Host Analytics team while ensuring detailed knowledge transfer to the customer. There is usually little or no need for involvement from IT, unless IT owns the Host Analytics relationship or the deployment requires building an automated data load.

By following this methodology, and with full buy-in and commitment from the customer, Host Analytics can implement the solution in as few as 8-12 weeks from end-to-end, with a much lower customer staff time commitment compared to the time and effort normally required to deploy on-premise solutions.

Purpose of this Document

This document has been developed to describe the process of deploying the Host Analytics solution. It provides an outline of the tasks, timelines, and resources required for the deployment, with a focus on the requirements from the customer organization. It is intended to be used for Host Analytics customers and prospects in their planning process.

Notes on Nomenclature

In this white paper, the following terms are used:

- **"Customer"** refers to the company purchasing the Host Analytics solution for whom the deployment is being done.
- **"Project team"** refers to the staff that performs the deployment process, including personnel from both Host Analytics and the customer.
- **"Solution Architect"** is the project lead from the Host Analytics Services organization.

The Host Analytics Difference

Host Analytics customers have consistently expressed pleasant surprise at how quickly and easily their solution deployments have gone, particularly compared to on-premise deployments, which can take many months and significantly more manpower and effort. There are three primary factors that drive the success of Host Analytics deployments:

- **Host Analytics staff.** The Host Analytics Services team pulls from industry and functional experts from around the world. Staff are senior-level U.S. and European CPAs and MBAs, and many have been business leaders. They average over 10 years prior to Host Analytics with experience in budgeting consolidation, reporting, modeling, and strategic planning.
- **Implementation methodology.** Host Analytics has developed a proven, repeatable implementation methodology, honed over the course of hundreds of customer engagements. It performs deployments on a fixed-fee basis instead of time and materials, and manages to tasks, not hours. This means that Host Analytics' incentives are aligned with its customers to make the implementation as efficient as possible.
- **Benefits of the SaaS model.** Pre-built functionality saves development coding time, and the testing and QA burden is reduced. This means the team can focus all its energies on implementing the application.

Project Team

All Host Analytics deployments are performed by a project team consisting of personnel from Host Analytics and the customer organization. This approach provides a strong foundation for bidirectional knowledge transfer, providing the customer organization with an in-depth understanding of their solution and its post-deployment day-to-day use.

Host Analytics Services Team

On the Host Analytics side, customer deployments are conducted by staff from the Host Analytics Services team, with the Solution Architect as the lead. The Solution Architect acts as the lead technical resource as well as the overall project manager, and coordinates with the rest of the Host Analytics Services, Support, and Training teams as necessary. Solution Architects are functional experts with in-depth experience implementing and using corporate performance management systems, have extensive experience with SaaS, and have performed multiple Host Analytics customer deployments.

Customer Staff

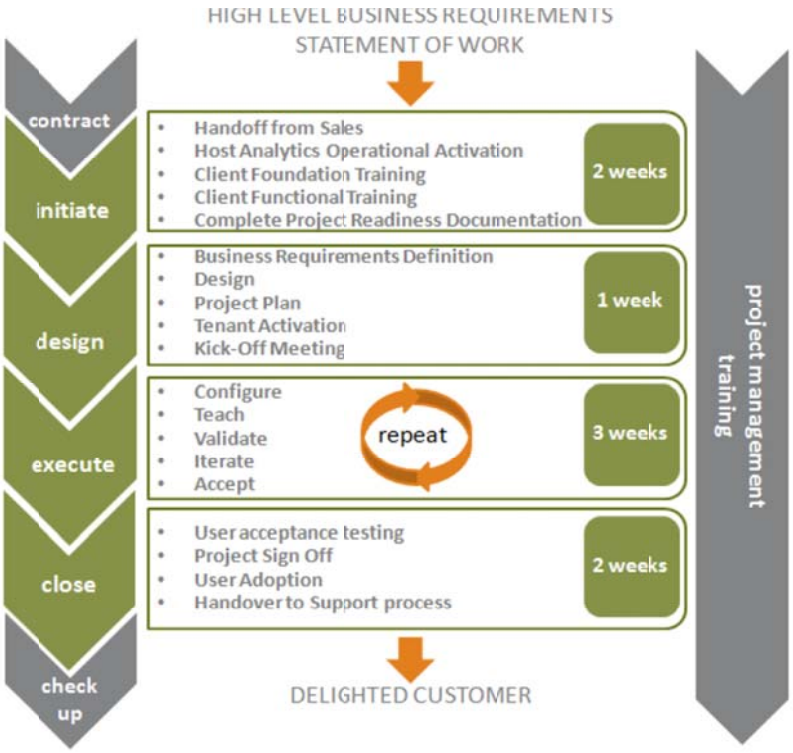
In addition to the Host Analytics staff, deployment teams also include personnel from the customer organization. The number of personnel and organizations involved vary from customer to customer, but typical deployment teams contain 1-2 staff, and most consist primarily of the main users of the Host Analytics system. These are usually individuals from Finance/Accounting, and can include financial analysts, budgeting managers, and other individuals who manage the general ledger and financial planning process. Usually executive level oversight is provided by a Controller, CFO, or VP of Finance, whose activities consist of reviewing status updates and ensuring the team is on track to meet its objectives.

Most Host Analytics deployments require little or no IT staff involvement. In some cases, for example if the customer has assigned ownership of the Host Analytics relationship to IT or if the team is building an automated data feed, there may be some need to include IT, but most of the time all development, validation, and rollout steps on the customer side are performed by the Finance team.

Host Analytics Deployment Process

At its highest level, the Host Analytics deployment process can be split into four phases: Initiate, Design, Execute, and Close (see Figure 1).

Figure 1 – Host Analytics Deployment Process Overview



Source: Host Analytics, 2011

Initiate

The Initiate phase formally begins a Host Analytics deployment. It is an opportunity to introduce key customer personnel to the Host Analytics Services organization and for the Host Analytics team to provide a greater in-depth introduction to the solution. During this phase, Host Analytics also lays out expectations for the project and educates the customer to what will be required to make the project a success.

There are three major customer-facing steps in this phase: Foundation/Functional training, a project readiness meeting, and population of the Activation Data Collection Document (ADCD). Behind the scenes, there are several steps that happen internally within Host Analytics, including an internal hand-off process from the Host Analytics Sales team to the Services organization and development of a statement of work (SOW) for the Host Analytics Operations team to activate the customer instance of the application.

The Initiate phase usually takes around 2 weeks, depending on the availability of key customer personnel for training and the kick-off meeting, and the turnaround time on required documentation.

Foundation/Functional Training

One of the first steps in the Initiate phase is scheduling and delivering training courses for the customer. Foundation training is an introduction to Host Analytics provided by the Host Analytics Training organization and consists of core training for users of the solution. This one-day training course covers topics such as the general structure of the application, how metadata is set up and used in the system, and how the customer loads and accesses data. Functional training is provided on topics specific to the modules the customer purchased, and can include Budgeting, Consolidations, Report Design, Revenue Planning, and Scorecards.

Project Readiness Meeting

During the Project Readiness Meeting the Solution Architect introduces the Host Analytics and client teams, and provides an overview of the deployment process, goals, and expectations. The Solution Architect provides critical information and documents including a step-by-step roadmap of the deployment process, a document describing key success factors for a successful project, and the Activation Data Collection Document. Finally, Host Analytics asks the customer to assign a lead for the project if it hasn't already.

Activation Data Collection Document

The Activation Data Collection Document is a key requirement during the Initiate phase. It is an Excel spreadsheet that captures all data information required from the customer, which will be used to load the appropriate metadata into the Host Analytics application. It includes information about the chart of accounts, general ledger data, budget entities and templates, segmentation of sales revenue, reports, currencies used, and system users.

The ADCD maps to the high-level business requirements (HLBR), a document created prior to contract signature and used to scope the solution during the sales process, and to the SOW developed by the Host Analytics Operations team as part of the internal hand-off from Sales. In addition, Host Analytics requests samples of existing reports, metadata, and general ledger data at this point.

Stage Gate Requirements to Move to Design Phase

To move to the Design phase, the following must be completed:

- Host Analytics Foundation/Functional training
- Project Readiness Meeting, with all information handed over to customer
- Activation Data Collection Document complete and handed over to Host Analytics, including all metadata and general ledger data

Design

Next comes the Design phase, in which detailed business requirements are defined, and a project plan for the deployment is developed. This is also the phase in which Host Analytics sets up the instance of the application for the customer. Finally, this phase includes a formal kick-off meeting which acts as the bridge to the Execute phase. The Design phase typically takes about one week.

Business Requirements Design Document

The design phase begins with a scoping exercise to document business requirements for the project. Host Analytics performs this exercise based on its understanding of the customer needs and information provided in the ADCD, SOW, and HLBR. The outcome of this exercise is the Business Requirements Design Document (BRDD), which defines requirements for the project. Host Analytics goes over the BRDD with the customer project team to ensure that all requirements are included and that everyone is aware of what has been scoped.

Project Plan

Once the Business Requirements Design Document is approved by the customer, Host Analytics and the customer create a project plan spelling out the tasks that will be performed during the deployment. The project plan includes all tasks needed to deploy the solution, and specifies owners, due dates, and dependencies. The plan covers both the tasks that will be performed by Host Analytics and those that will be performed by the customer.

This plan covers work items at a granular level and focuses on the tasks required to perform the rest of the Design phase, as well as Execute and Close. Sample tasks include configuring templates, developing reports, loading customer financial data, validating the application, and completing handoff items. Based on the project plan, Host Analytics and the customer then set a go-live date for the deployment.

Tenant Activation

During this phase Host Analytics activates the customer's instance of the application, allowing the customer to access the tool for the first time. Once the instance is up and running, the Solution Architect provides necessary login credentials and application installation instructions to the customer. This usually occurs about three weeks into the overall project.

Kick-off Meeting

The Design phase concludes with a kick-off meeting, during which any new or additional members of the project team are introduced to the solution and the project. During this meeting the Solution Architect provides a project overview, describes the communications plan for the remaining phases, and schedules weekly status meetings for the remainder of the project. By the end of this meeting Host Analytics also requires signoff from the customer on the BRDD and project plan.

Stage Gate Requirements to Move to Execute Phase

To move to the Execute phase, the following must be completed:

- Business Requirements Design Document complete and signed off by customer
- Project plan complete and signed off by customer
- Tenant activation complete with login credentials provided to the customer

Execute

The Execute phase consists of configuring the required application components, building out reports and templates, and populating the Host Analytics application with customer data. To ensure strong knowledge transfer, Host Analytics requires significant involvement from the customer project team during this phase.

The length of this phase can vary greatly depending on the complexity of the deployment, the number of templates and reports to be developed, and–primarily–on the level of commitment of the customer project team. For a typical project, this phase usually takes about 3 weeks.

Development

At this point, the project team begins development of application configuration tasks. These could include tasks such as loading segments, hierarchies, and data; configuring application currencies; creating scenarios and budget hierarchies; creating workflows; and building reports.

Host Analytics employs a rapid prototyping approach, in which development, testing, and feedback are performed in quick, iterative cycles. The team schedules regular development check-ins which are used to resolve issues that come up during development, whether identified by Host Analytics or

customer team members. Once any issues are addressed, the team goes back to development and the cycle starts over again.

Throughout the cycle, each team member performs preliminary testing of the elements they are building, with a final application validation occurring at the conclusion of the Execute phase.

Knowledge Transfer

A critical component during the Execute phase is knowledge transfer to all relevant parties. This occurs in several ways, including:

- **Weekly status meetings and reports.** The team has short (30 minute) weekly status meetings devoted to tasks completed, tasks that are behind, and any information required from other members of the team. This is an update meeting only, with detailed technical issues handled during Q&A sessions (below). A weekly status report is also provided to the project team and executive sponsors via email.
- **Executive review.** The project team leadership provides email updates to the customer executive project sponsor at regular intervals. They provide information on the project status, including actions completed, overall project schedule, and upcoming tasks and activities.
- **Q&A sessions.** These consist of every-other-day check ins between Host Analytics Services staff and the customer project team. They are intended to address any functionality questions that arise.
- **Data movement, template, and report validation.** Throughout the Execute stage, the customer must validate all components for accuracy as they are being developed. This includes reports, data movement, and template components. Components are then adjusted as necessary.

Final Application Validation

During this task, all components are validated one final time to ensure they are working as specified. All formulas, financial reports, and ad/hoc reports are checked and data is validated to ensure that it matches the expected customer data.

Client Close Plan

The final task in the Execute stage is the development of a Client Close Plan. Host Analytics schedules a meeting of the project team to review completed development activities and identify open tasks. Open tasks are captured in the Client Close Plan, a document that lists out items that still need to be completed, who is responsible, and the date by which they will be completed.

Once the Client Close Plan is in place, the Execute phase is over, and all weekly status reports and meetings conclude at that point. A date is also set to complete the project and move the customer into ongoing support mode, that is, to transfer ownership of deployment from the Host Analytics Services team to the Host Analytics Support team.

Stage Gate Requirements to Move to Close Phase

The only customer-facing task that must be completed prior to moving to the Close phase is completion of the Client Close Plan. In addition, Host Analytics performs non-customer facing activities to prepare the Support organization to begin providing service for the customer.

Close

The final project phase is the Close. This phase has very little customer involvement, and primarily consists of Host Analytics internal handoff processes to transfer ownership of the customer relationship to the Host Analytics Support team.

The primary customer-facing tasks during this phase are closing out any remaining items on the Client Close Plan. There may also be some additional customer education as the customer begins actually using the application and continues to close out any remaining open items. Finally, the Solution Architect schedules a post-30 day review call with the customer project team and executive sponsor.

Impact of Implementing an Automated Data Load

Host Analytics supports two methods of importing data into the application: manual and automated data loads. By default, customers can import data into Host Analytics using an import wizard, which accepts files in one of the formats supported by Host Analytics. While this manual process is very simple and straightforward, it still requires active intervention by the user.

In contrast, Host Analytics can set up an automated data load that automatically and regularly exports information from the customer's systems and imports it to Host Analytics. Customers always begin by using manual data loads, and down the line as they become more familiar with Host Analytics they sometimes decide to implement an automated data load. Some customers opt to implement an automated data load during their initial deployment, and for these customers there are additional tasks which affect the deployment process.

The primary impact on the process is the work required to develop the integration itself. Building an automated data load is not sequential with the remainder of the project; in other words, the steps involved can be performed while the rest of the development tasks are underway. In fact, development of the automated data load does begin from the very start of the project. Nevertheless, building the automation does require time and manpower resource, and typically adds time to the total project timeline.

This is one deployment task in which IT often gets involved, as IT usually wants to understand how the feed is constructed so they can support it in the future. Typically a single member of the IT staff is required with an approximately 20% time commitment over a 6-7 week period. Common job titles for this role are IT manager, IT analyst, and network system administrator.

Required Resources and Expected Time Commitments

As described previously, typical project teams consist of 1-2 customer FTEs, usually coming from the Finance/Accounting organization. Occasionally there may also be a staff member from IT depending upon the organization's overall stance toward the deployment or whether an automated data load is being built.

Time commitments from team members vary according to their background and role and the phase of the project, with typical requirements being on the order of 20-50% of their time during the course of the project. Typical project duration, customer staff requirements, and responsibilities by phase are provided in Table 1.

Table 1 – Typical Customer Staff Requirements by Project Phase

Phase	***Typical Duration (weeks)***	***Staff Role(s)***	***Staff Time Req't***	***Primary Responsibilities***
Initiate	2	– Finance/Accounting: Financial planning/ budgeting manager, analyst – Sometimes IT	20%	– Attend training and kick-off meeting – Document requirements in ADCD
Design	1	– Finance/Accounting: Financial planning/ budgeting manager, analyst (day-to-day); Controller/CFO (executive oversight)	20%	– Attend kick-off meeting – Contribute to and validate project plan – Review and sign-off on BRDD
Execute	3	– Finance/Accounting: Financial planning/ budgeting manager, analyst (day-to-day); Controller/CFO (executive oversight)	50%	– Perform development tasks per project plan – Attend status meetings – Contribute to final application validation
Close	2	– Project lead (Finance/ Accounting)	5-10%	– Review and approve Customer Close Plan
Automated Data Feed (Optional)	~1 week added to the project	– Project lead (Finance/ Accounting) – IT: Analyst/ system admin	20%	– Build connector to import data to Host Analytics API friendly format

Source: Host Analytics, 2011

Project Communications

Host Analytics has built a number of methods into its methodology to ensure ongoing and regular communications throughout all key phases of the project. These are described in detail above, and summarized in Table 2.

Table 2 – Key Project Communication Channels by Phase

Phase	*Communication Channels*
Initiate	– Welcome email – Readiness meeting – Ad hoc communications as necessary
Design	– Tenant activation information (login info) email – Kick-off meeting – Ad hoc communications as necessary
Execute	– Weekly status meetings – Weekly status report – Executive review – Every other day Q&A sessions – Data movement, template, and report validation – Ad hoc communications as necessary
Close	– 30 day review – Ad hoc communications as necessary

Source: Host Analytics, 2011

Key Success Factors

Leveraging the learnings from multiple customer deployments, Host Analytics has identified a number of factors that contribute to the success of a project. By far the most important factor is the customer's commitment to and focus on the project. Specific key success factors include:

- **Commitment to Host Analytics application activation methodology.** The Host Analytics methodology is a step-by-step deployment process with a proven track record of success. Deployments in which the methodology is embraced by the customer have been consistently implemented in a timely manner.
- **Dedicated project manager on the customer side.** It is important to have a specific individual from the customer organization to oversee the project. This person could be from Finance/Accounting or from a Project Management office. Responsibilities include organizing project resources, communicating to team members, and collecting and forwarding necessary project documents.
- **Commitment to the project plan and supplying project deliverables in a timely manner.** The project plan details the tasks required to make the project a success. A strong commitment from the customer team to completing those tasks on schedule is critical to success.
- **The ability for the project team to balance Host Analytics tasks with their day-to-day jobs.** The Host Analytics deployment process is very rapid, with project team members required to execute their required tasks within a compressed 8-12 week timeline. They must be able to multi-task during this period of time, balancing their day-to-day responsibilities with project workload requirements.
- **Complexity of the deployment.** Another key success factor determining the length of the deployment is its complexity, specifically the number of Host Analytics modules to be implemented. While more modules add more tasks and therefore increase the overall timeline, the effect is not linear, even in the Execute phase, as there are many foundational tasks such as setting up general ledger accounts that apply across all modules. Generally speaking each module could add one to two weeks to the timeline, so if a project to implement a single module, say Budgeting, would take 6-8 weeks, adding Consolidating and Forecasting may add another one or two weeks, or up to 8-10 weeks total.

Conclusion

Unlike many other corporate performance management solutions, particularly those requiring on-premise software, Host Analytics has a very rapid deployment cycle. While competitive products can require the better part of a calendar year or even more and many staff-months to implement, Host Analytics can be implemented in as few as 8-12 weeks, with a total staff commitment 1-2 personnel devoting up to 50% of their time.

This rapid deployment cycle is enabled in part by the Host Analytics SaaS model, which alleviates the need to deploy servers, software, storage, and networking equipment at the customer's site. It is also enabled by the Host Analytics deployment methodology, which leverages the learnings gained over hundreds of customer engagements and is designed to deliver a completed deployment as rapidly and efficiently as possible.

For additional information on the Host Analytics deployment methodology, or to discuss specific details for your deployment, contact services@hostanalytics.com.

About Callan Consulting:

Founded in October 2000, Callan Consulting is an executive-level consultancy focusing on the information technology industry. Ed Callan, Principal of Callan Consulting, leverages over 25 years' experience in technology management to help companies identify best-fit vendors for their IT needs. Additional information can be found at www.callan-consulting.com.