

Roadmap for Business Transformation & Vendor Selection



Challenge

Competing in a highly regulated retail market is difficult for small-scale companies. One of our clients in the retail industry was facing a similar challenge where they had to break through existing market domination from a retail giant. This is where BPK Tech comes in.

BPK Tech collaborated with the client to review and assess their business model and understand their current technology. The client was using 30 different software for their business and needed assistance with consolidating the right technology and CRM solution. The major challenge was to help the client break into an already established market with the right strategy and business model.

Our Solution

We analyzed the client's projects and roadmap to recommend an agile strategy, which incorporates their everyday operational and technical improvements along with their projects. The next part of the solution was to provide customized agile training that specifically meets the client's requirements.

The goal of the training was to help with technology implementation, estimation, and story writing. We trained 2 groups of people in agile, which had 32 members. Our team worked with the stakeholders to help the client identify and focus on key projects by leveraging the MoSCoW method.



Project Location

United States



Team Size

7 members



Technologies Used

Agile methodologies, Office 365



Project Duration

6 months



Here are some other solutions that we offered the client:

- Identified productivity applications, infrastructure, business applications, and process recommendations.
- Assisted with a few projects to minimize hours and costs spent on the project.
- Recommended a single application—Office 365—and educated them about the application to manage all their business operations instead of using 30 different applications.
- Developed a way to centralize customer communication in Dynamics CRM.
- Educated the client teams on vendor selection, negotiations, and checking references.
- Set up the complete IT roadmap and provided a 360-degree view of the customer data with CRM and marketing automation integration.

- Created the Statement of Work (SoW) for the client to help them ask their vendors to implement their CRM solutions.

Results

After applying our solutions, the clients were able to improve their business strategy with agile adoption. The key results we brought to our client's business are:

- Less time and money spent on projects with agile training and assistance.
- Increased productivity and efficiency by using a single application (Office 365) for all business operations.
- Faster decision-making and improved project prioritization with the MoSCoW method.
- Client's team was well-trained in agile methodologies for vendor selection, negotiation, and customer communication.
- Quick turnaround time and improved decision-making by Project Managers and Business Analysts.

Key Benefits

- Complete IT roadmap for the client.
- Client can make smart vendor selections and negotiations.
- Every team is trained in agile to improve focus, decision-making, deliverables speed, and better way to escalate issues.
- Day-to-day tasks are prioritized and sorted with an agile approach.
- Substantial boost in productivity and efficiency with the cut down of 30 applications to a single one.