



Silver Catalyst

A Methodology That Assures Outcomes



Why Methodologies Matter

70% of transformations fail, most often due to poor planning and execution - McKinsey & Company, 2022

Transformation set for success

- Understanding of present state
- Clear and thought-out workplan
- Alignment on goals and outcomes
- Defined success metrics and KPIs
- Clear accountability for teams, individuals, and partners
- Organized and supportive leadership
- Pre-planned detailed budget

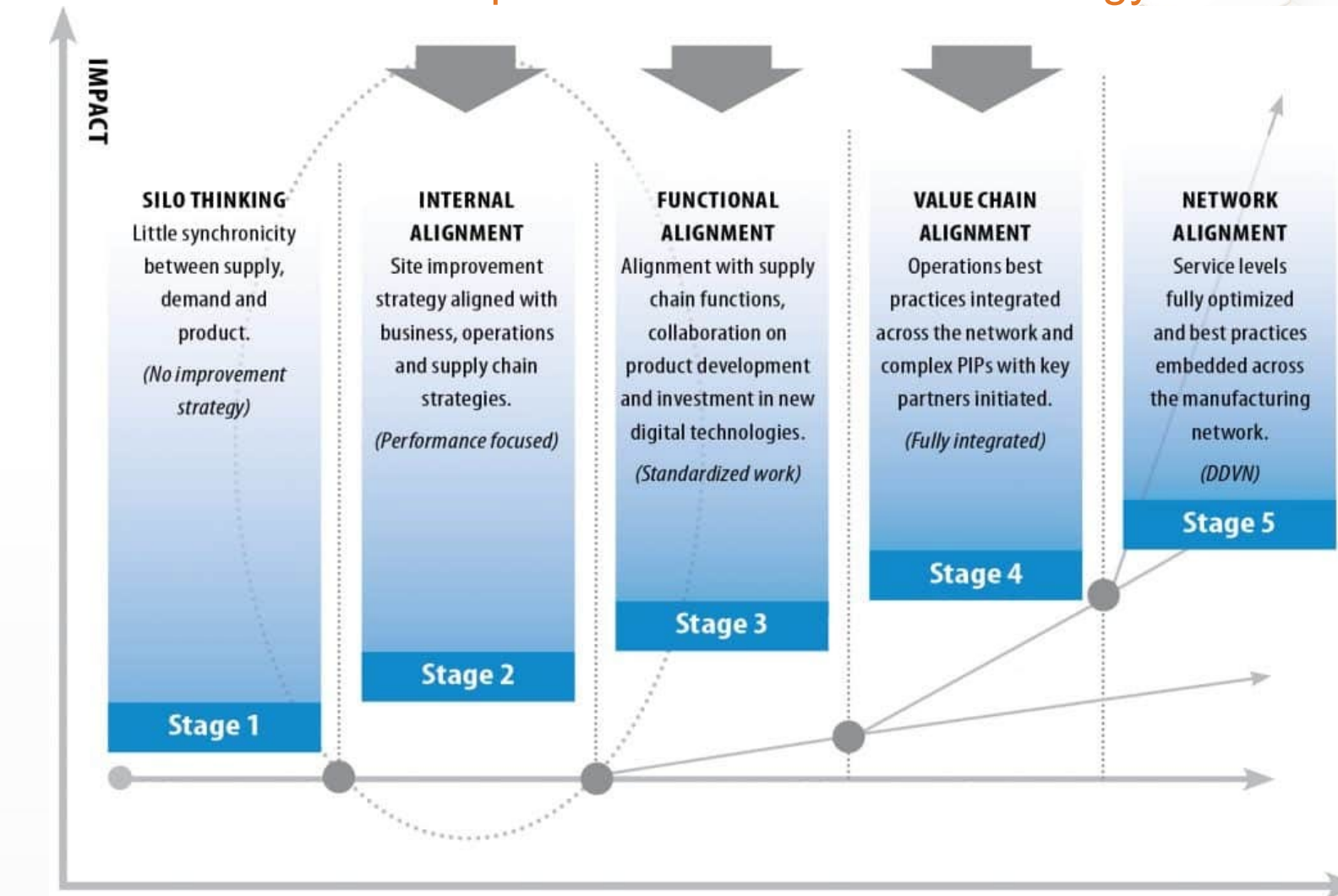
Transformation destined for failure

- Incomplete understanding of the status quo
- Poor planning
- Ill-defined success metrics and KPIs
- Misalignment on goals and outcomes
- No accountability
- Failure of leadership
- Cost overruns

Well-designed plans and blueprints assure desired outcomes

Why Operational Alignment is Key

Transformation requires more than a methodology alone



The Silver Catalyst MethodologySM

Unlock meaningful change through our time-tested process



Outcomes are assured through structure, organization, and execution



Connect "Where you are" to "Where you want to go"
BEFORE the journey begins

Align >

Assess >

Design >

Implement >

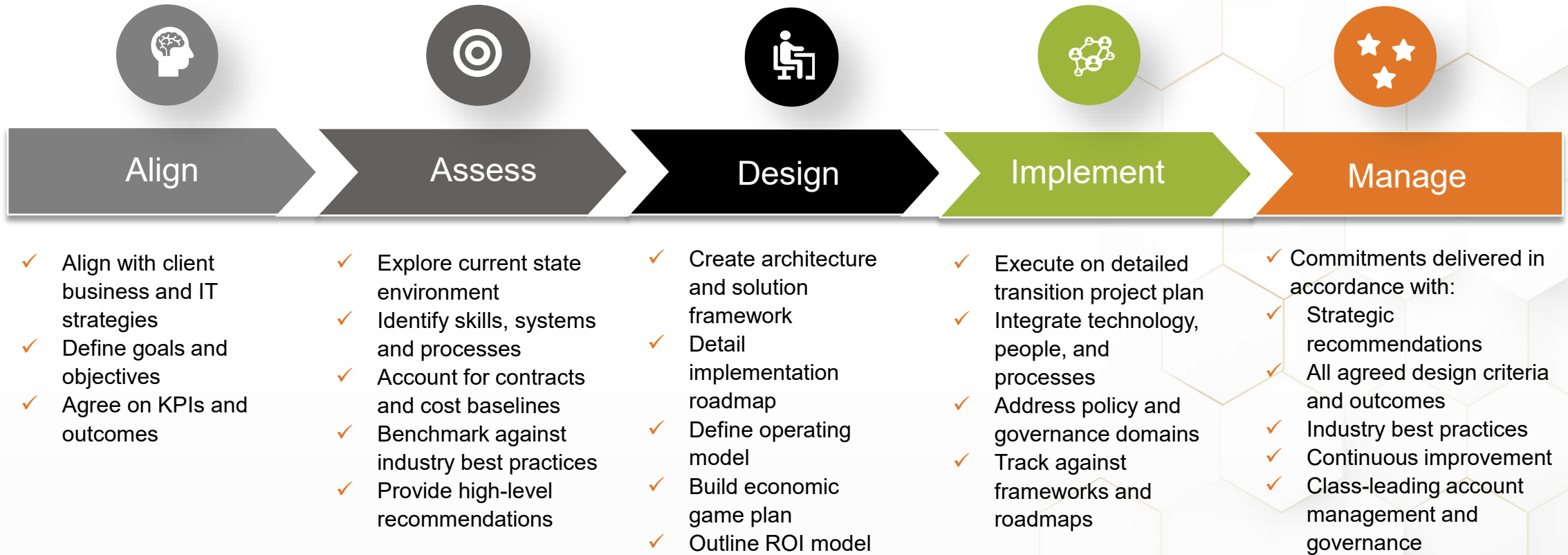
Manage



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Silver Catalyst Explained

A Methodology that Assures Outcomes



SILVER CATALYST: Methodology Workflow

Optimal approach: Balanced level of detail with speed

Our evaluation process ensures that review and acceptance of deliverables occurs within 30 days

Align

- ✓ Set schedule
- ✓ Collect available information
- ✓ Communicate to key individuals
- ✓ Set communication cadence

Assess

- ✓ Meet with SMEs
- ✓ Observe and document processes
- ✓ Collect data
- ✓ Start analysis

Design

- ✓ Verify context items with SMEs
- ✓ Create data inventory
- ✓ Complete data analytics
- ✓ Visualize analytics
- ✓ Identify opportunities

Implement

- ✓ Present analysis and results to executives and stakeholders
- ✓ Provide guidance for implementation

Example Artifact

Phase	Align	Assess	Design
Activities	<ul style="list-style-type: none"> • A request for proposal is received formally or informally • Determine size of assessment, assessment category and scope • Develop initial SOW • Develop deal cost and pricing • Schedule CIO/Exec Meeting • Prepare and distribute confirming notes • Adjust and finalize SOW and assessment scope 	<ul style="list-style-type: none"> • Request for documentation • Create MS Teams site • Store documentation • Review documentation • Schedule Interviews • Conduct interviews • Prepare preliminary baseline report • Review baseline report with client • Prepare final baseline report 	<ul style="list-style-type: none"> • Develop preliminary Target State • Prepare preliminary Improvement Recommendation Report • Review preliminary Improvement Recommendation Report with client • Adjust and prepare final Improvement Recommendation Report • Draft priorities • Review and adjust priorities with client • Structure duration and timelines for improvement recommendations • Develop High-Level Transformation Roadmap • Develop High-Level Transformation Program Plan- Roadmap and project charters • Review High-Level Transformation Program Plan with client • Adjust and prepare final High-Level Transformation Program Plan
Deliverables	<ul style="list-style-type: none"> • Confirmation notes complete • SOW completed • Client Acceptance 	<ul style="list-style-type: none"> • Reviewed baseline assessment with client • Completed final baseline report • Client Acceptance 	<ul style="list-style-type: none"> • Completed Improvement Recommendations Report • Completed High Level Transformation Roadmap • Completed High-Level Transformation Program Plan • Client Acceptance
	Single Document		
Process		<ul style="list-style-type: none"> • Process Document • Process Workflow • Procedure Document • Process Measurements 	
Templates/ Work Products	<ul style="list-style-type: none"> • Confirming_Notes.docx • SOW.docx 	<ul style="list-style-type: none"> • Documentation_List.exe • Email_request_for_documentation.docx • MS_Teams_Hierarchy.docx • Interview_template.docx • Schedule.docx • Interview_notes.docx • Baseline_Report.docx 	<ul style="list-style-type: none"> • Target_State.docx/Target_State.pptx • Improvement_Recommendation_Report.docx • Priorities.docx • High-Level_Transformation_Roadmap.pptx (or Excel) • Project_Charter.pptx • High-Level_Transformation_Program_Plan • Managed_Services_Solution.docx



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Case Study

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Transformation Success through Silver Catalyst

Mid-Market NFP

Align/Assess

Client desired to:

- ✓ Reduce IT costs
- ✓ Mitigate security risks
- ✓ Enhance services across infrastructure, desktop engineering, network and corporate applications
- ✓ Improve organizational effectiveness and efficiency through process reengineering and documentation

Additionally, the client needed to account for new business requirements due to COVID19 while improving access to talent at a lower cost.



Design/Implement

Moved client from US-based internal IT dependency to 90% outsourced services

Planned and executed move from Zendesk to Managed Engine Services

Designed and delivered multi-year security program including NOC and SOC to harden operating environment

Designed improvements for applications support and benefits and payroll processing



Outcome

Leveraging Silver Tree's global operating model, client outsourced Infrastructure, Corporate Applications, and Business Services for 30 locations and 3500 users

Access to talent at a lower cost (40% cost savings) enabled client to position itself for growth, minimize resource challenges and realize IT agility.

Improved data transparency and service reporting – Industry SLAs being met or exceeded

Security hardening program has reduced risk significantly