

PLANNING AND PERFORMANCE ALIGNMENT SERVICES

Readiness

Road Map

Blueprint

Implementation

Overview

Through the recent **Policy on Results** and implementation of core **Deliverology** concepts, the Government of Canada has established a new "**Results and Delivery Agenda**". Key enablers of this agenda include innovations around improved integrated planning and performance reporting processes coupled with supporting data and technology enablement. A significant component of this mandate can be achieved through a **SAP toolset** available to all GC departments and agencies through an existing PSPC Standing Offer for:

- **Strategic, operational, financial planning**
- **Improved performance monitoring, analysis and reporting**
- **Predictive analytics & data mining**

Key Focus Areas

- **Results: Performance Reporting**
 - Key performance indicators, trend and variance analysis, thresholds, cause & effect visualizations, accountabilities, support key commitments, Departmental Results Framework (DRF) and Performance Information Profiles (PIPs)
- **Delivery: Strategic and Operational Planning**
 - Operational workplans, deliverables, milestones, performance indicators, corporate and operational risk alignment, linkages to DRF/PIP and key commitments
- **Delivery: Financial Planning**
 - ARLU, funding allocations and management, internal transfers, budget management and forecasting, multiyear planning and tracking

Createch-Landmark Alignment Program

*Our alignment program is a series of service offerings designed to assist departments in strengthening their integrated planning and performance reporting landscape. It also helps operationalize **Treasury Board Secretariat's (TBS)** and **Privy Council Office (PCO)** guidelines and direction. The program leverages the **SAP Enterprise Performance Management (EPM)** suite of tools including **Business Planning and Consolidation (BPC)**, **Business Intelligence (BI)**, and **Strategy Management (SSM)**. All of the tools are available to GC departments and agencies through the SAP Enterprise Information Software Solution (EISS) standing offer #EN578-123329.*





Four Steps towards a Successful Project

- **Readiness** – an assessment of the level of maturity by which a department manages its financial and operational planning processes, forecasting, and performance reporting and analytics, all in alignment with TBS/PCO direction
- **Road Map** – a tactical plan to achieve alignment of departmental priorities through more effective planning and performance reporting. This includes options for leveraging investments in SAP technology as well as organizational and change management considerations. The Road Map can also include a Proof of Capability (POC) illustration to demonstrate SAP software capabilities in meeting departmental business requirements
- **Blueprint** – Detailed planning including the development of full business and system requirements together with internal/external resourcing estimates for full project implementation costing. The Blueprint also includes the development of a change management strategy and a comprehensive implementation plan
- **Implementation** - full technical and business process redesign implementation services to realize the solution design (Blueprint) including technology and data integration, project management oversight, user interactivity, and knowledge transfer to support departmental self-sufficiency in the longer term.

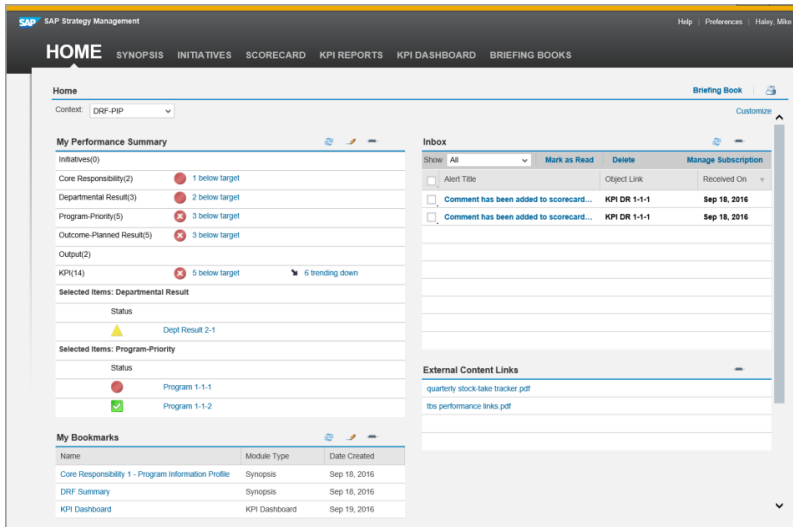
Key Features

- Provide a solution that is customized to your business needs and technology environment
- A standardized implementation approach to ensure project completeness and success
- Support for specific phases/gates in any project investment planning
- Ability to apply the four project steps to any or all of the three Key Focus Areas



Illustrative SAP BI Dashboard for Integrated Planning and Performance Reporting

THREE "START ANYWHERE" OPTIONS FOR RESULTS AND DELIVERY



Illustrative SAP SSM Summary of Results and Delivery Performance

Delivery: Strategic and Operational Planning

- Strategic and operational results alignment
- Multi-dimensional planning (by branch/business unit, program, region, client, etc.)
- Integrated work planning and reporting including consolidation of corporate service "asks"
- Work plan deliverables, milestones, key performance indicators, accountabilities, operational risks, HR allocation/planning processes
- Alignment to key mandate commitments, Departmental Results Framework (DRF), corporate risks, projects/initiatives, financials

Results: Performance Reporting

- "Stocktakes" of Key Performance Indicators (KPIs) and delivery initiatives
- Linkages to Departmental Results Framework (DRF) and Performance Information Profiles (PIP)
- Business analytics including performance trends and variance analysis
- Cause and effect diagrams (logic models or strategy maps)
- Performance commentary, annotations and alerting
- Dashboards and scorecarding

Cost Center	350001
Version	WP Draft - Pre Approval
Time Period	FY 2016-17 Q1

Delivery: Financial Planning

- ARLU allocations
- Notional budget allocations
- Internal budget transfers
- Labour allocations and salary management
- Budget/forecasting management
- Funding identification and tracking (A-Base, B-Base, TBSubs, MCs, SPAs)

Unit Workplans		Workplan Labour Allocation %							HR Requirements/Asks				
Workplan ID	Workplan Description	John Smith	Don Cook	Jane Jones	Jean Cle	Sarah Mele	EC7	AS6	HR Gap Issue	Type of HR Gap	Other HR Gap	Gap Sol. Via Recruitment	Gap Sol. Via Learning
ABC-WP1	Overview of Workplan 1	15	5		40	25			Yes	Shortage of management competencies	N/A	Yes	Yes
ABC-WP2	Overview of Workplan 2		20	20		20			Yes	Lack of breadth of experience	N/A	No	No
ABC-WP3	Overview of Workplan 3	25		40		55	100		Yes	Shortage of technical competencies	N/A	Yes	No
ABC-WP4	Overview of Workplan 4	60	45		30				No	N/A	N/A	No	No
ABC-WP5	Overview of Workplan 5		30	40	30			100	Yes	Other (please provide details)	Lack of team tools to collaborate	No	Yes
Total Allocation		100	100	100	100	100	100	100					

Illustrative SAP BPC Template for Integrated Planning (HR Workplan Allocations and Support Requirements)



	Readiness	Road Map	Blueprint	Implementation
	Readiness Assessment	Roadmap	Blueprint	Implementation
Summary	High-level appraisal on the organization's state of preparedness for implementing enhanced planning and/or performance processes and solutions	Mid-level planning to achieve alignment with Treasury Board Secretariat/PCO priorities and direction. Proof of Capability (POC) design to demonstrate alignment of solution capabilities	Detailed planning including the development of full business and system requirements together with internal/external resourcing estimates for full project implementation costing	Project management and technical services to implement solution design including technical & data integration, user interactivity, security, testing, system rollout, and training for user community
Deliverables	<ul style="list-style-type: none"> • Current and future planning process high-level review • Fit-gap analysis • Readiness assessment report and recommendations for performance and/or integrated business planning • Executive presentation 	<ul style="list-style-type: none"> • Recommendations toward alignment with TBS/PCO direction • Proof of concept demonstrating system capabilities high level project plan and costing • Executive presentation 	<ul style="list-style-type: none"> • Detailed business and system requirements • Project readiness including internal capacity analysis • Change management strategy • Executive presentation 	<ul style="list-style-type: none"> • Implementation of integrated solution utilizing approved SAP methodology • End-user training • Post go-live support
Investment Project Support	Gate 1 – Idea Generation	Gate 2 – Project Initiation	Gate 3 – Project Planning	Gate 4 – Project Execution
Training & Knowledge Exchange	Customized workshops on performance and planning concepts, data requirements, and technology options	Customized workshops for GC SAP solution options: <ul style="list-style-type: none"> • Business Planning and Consolidation (BPC) • Business Intelligence (BI) • Strategy Management (SSM) 	Software orientation and business requirement gathering workshops based on Proof of Capability (POC) models for key users	User training and knowledge exchange on both technical and end-user aspects of the final solution