

Regional service-excellence operating model

Service diagnostic (2018)

Work sample, anonymised — client, people
and internal tool names removed

Case summary, then the service diagnostic
findings deck of 9 September 2018

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Problem

Stabilise an existing Cairo payment-service team and scale regional support — without forcing incompatible country processes into one model

Africa & Middle East commercial operations needed to stabilise the existing payment-service team in Cairo and scale regional support to further services and countries.

Gulf, North African, Middle Eastern and South African markets differed in language, data sources, sales channels and regulatory requirements.

Prior Gulf-centric workflows had failed to gain sustained adoption after three years.

Action

16-week engagement (July–November 2018): sponsor principles first, then diagnostic, operating model, sourcing options and transition design

Agreed sponsor principles before designing the model: no cost increase, unchanged client interactions, standardisation except for regulation, HR alignment.

Diagnosed 13 services with a validated 7-benefit / 5-complexity scoring matrix, retaining dissenting comments; screened for common systems, measurable SLAs, control, judgement and physical presence.

Used Cairo's three-year struggle to reframe a single centre as the risk; compared local, internal and third-party sourcing costs (\$25–45k / \$80k / \$50k per FTE).

Designed three virtual teams, a task-based transition and a two-task pilot representing 42% of the 21-FTE workload; the function leads presented the design.

Result

Five services prioritised out of 13, a two-task pilot, and a sponsor-agreed horizon with a May 2019 sourcing decision point

Delivered the service diagnostic, target operating model, sourcing options, governance framework and transition blueprint.

Five services retained for the initial cut; physician data management and plan-of-action preparation selected for the first pilot across two or three markets.

Sponsors agreed a five-to-six-month visibility horizon, a May 2019 sourcing decision point and expansion with the common 2019 sales-force platform.

Implementation followed the engagement: no post-departure adoption, savings or service-level outcomes are claimed.

Pharmaceutical group — Africa & Middle East

CO Service Excellence TOM

Service Diagnostic Findings

9th September 2018

V7 - Reviewed

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Agenda

Scope and Approach

SE Candidate Processes Analysis

SE Process Transition Priorization

Next Steps

A set of key areas of CO services were submitted for identification of appropriate SE candidates

	In Scope	Data Processing & Reporting	System & Tool Administration	Other Specific Process	Primary Points of Contact (Process Owner)	Service ID (as per service catalogue 2018)	Comment
Existing Service Excellence Programs Underway	1. Meeting and Events / Payment Processing	X	X	Increase Scale of existing Service Excellence Team	M&E service lead M&E lead	CE&E 1/2/3	Payment services already partially processed by SE Team for the Gulf
	2. Training System Administration	X	X		Training SE lead	TR 1/2/3/4/5/6	
	3. Data Stewardship	X	X		DCE lead	Across Functions (DCE 3/4)	Analysis postponed to Sept.
	4. Promotional Material	X	X		SMS lead Ahmed Ramah	SMS 1	
Identified Opportunity	5. Field Force Incentive Calculations	X	X	Onboarding of the incentive platform	Cluster lead (SAR+NEAR)	SMS 10	Removed from SE TOM project scope
	6. SFA Administration	X	X	Onboarding of the new SFA platform	SMS lead	SMS 7/8/9	
				Compliance	SMS lead		

A set of key processes are identified as candidates for onboarding the SE team

	Meeting& Events	Training	Sales and Marketing Services	Digital Channel Enablement
Setup and user admin	Onboarding, system and process training, authorizations, access right, user revocation*			
Data management and performance / service quality reporting	Data Quality, data extraction/automation, regional KPI reporting, service performance, service quality and report distribution			
Planning, booking, application and execution management	Meeting planning and organization	Training planning, organisation and execution	Promotional operations	Sample management
Content Services		Needs consolidation	Content management	
Payment	Vendor payment services	Vendor payment services		
Compliance Management	Procurement compliance, anti-corruption compliance	Certification management	Content compliance	

Workshops, interviews, document analysis and process reviews were conducted to assess SE eligibility of candidate processes

20+ sessions with SE / function
leaders and local teams



CO Services	Service Diagnostic and Analysis	Process eligibility assessment
1. Meeting and Events / Payment Processing	• Service benchmark review, include technology, process map, required skills and volumetrics	• SIPOC
2. Training System Administration	• Demand / capacity analysis – solutions to deal with demand fluctuation, seasonality	• Process Flow Analysis / RACI / team interaction
3. <i>Data Stewardship*</i>	• Customer journey identification, value proposition to internal customer, touchpoints analysis and context of utilization, current level of internal customer satisfaction	• System View
4. Promotional Material	• Process execution flow, applications used, data leveraged, possible handoff points between local and SE team to minimize frictions?	• Volumetrics
5. <i>FF Incentive Compensation**</i>	• Skills needed to execute the process	• Team and Skills
6. SFA Administration	• SLAs in place and measurement, performance management and KPIs	• Process monitoring
7. Sample Administration	• What are the main challenges currently encountered?	• Governance and Reporting

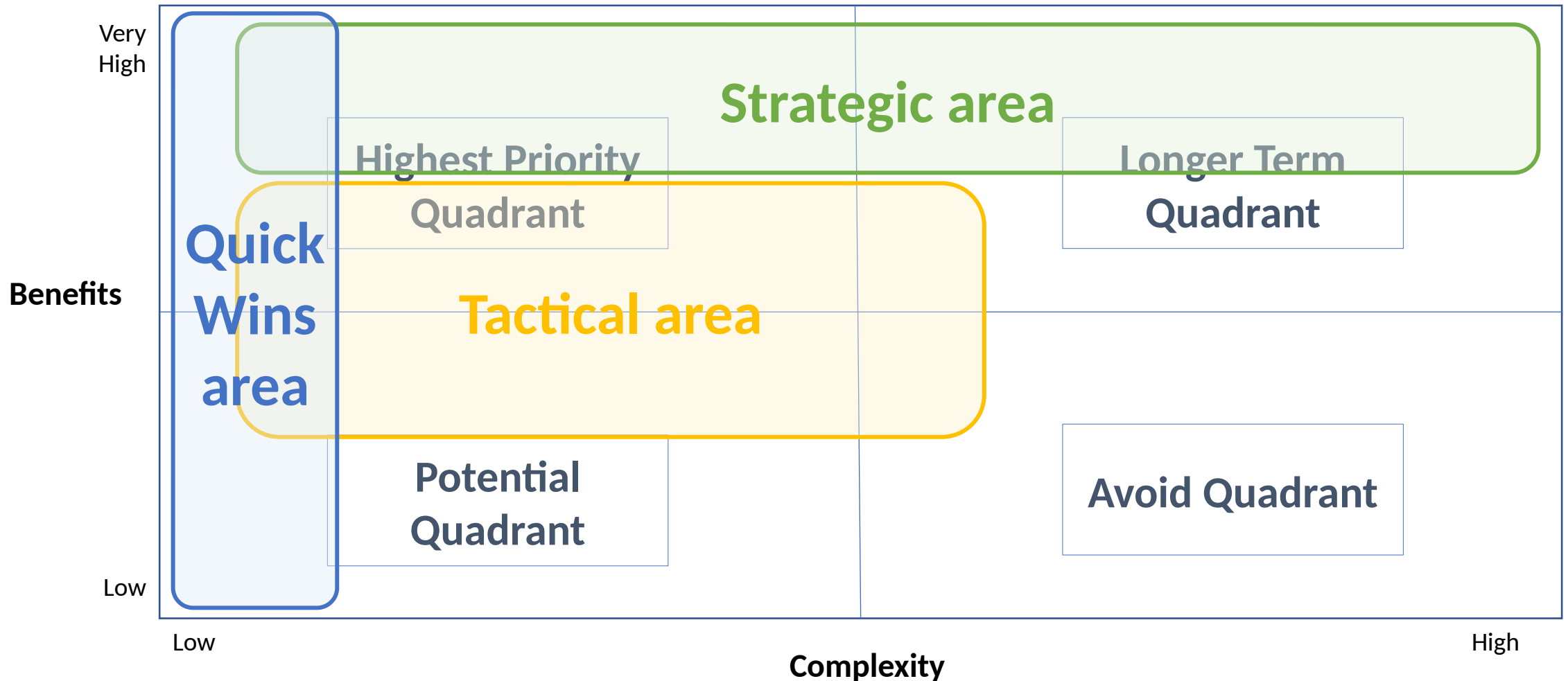
* Analysis postponed to Sept.

** Removed from SE TOM project scope

The diagnostic of the candidate processes provides a first assessment of the complexity and benefits for SE transition

	Definition	Relative Values	Areas considered	Rating system
Benefits	The benefit or value gained or realized by keeping the service within the Service Excellence(SE) team or relocating the relevant service to the Service Excellence team(SE) from the relevant local team	• Very High • High • Medium • Low	1. Lean/waste reduction (e.g. removal of process friction) 2. Financial benefits (e.g. savings or cost avoidance) 3. Improvement of service quality 4. Efficiency / scalability 5. Higher specialization 6. Improved governance (Ownership, responsibility) 7. Process control, compliance / separation of duty	1. Major decrease 2. Moderate decrease 3. Similar or non ratable 4. Minor Improvements 5. Major Improvements
Complexity	The complexity or complication achieved by keeping the service within the Service Excellence(SE) team or relocating the relevant service to the Service Excellence team(SE) from the relevant local team	• Very High • High • Medium • Low	1. Reengineering need 2. System impact 3. Importance/size of population concerned 4. Complexity of Deployment 5. Change management	1. No impact 2. Minor / limited change 3. Significant changes / limited scale 4. Significant changes / large scale 5. Major / FOAK large scale transformation

According to Benefits / Complexity scoring, initiatives are positioned in a matrix to help defining priorities



1. Regional KPI reporting

WIP*

Scope: automation of the data extraction, data quality, aggregation, analysis reporting and distribution of the service performance reporting. Involves an automated feed from CO corporate systems (LMS, Cvent, etc.) which requires itself a completion of implementation and alignment of system usage

Might involve as well some governance framework refinement with KPI re-alignment ahead of the transition to SE and some re-engineering of dashboards might be needed to fit with new framework

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)		- elimination of manual data collection - consolidation step automated - data quality checked at the source - There is already regional KPI set plans to work on eliminating manual work and automation of reporting/Quality reviews. - For training - colleagues still have to do local tracking to capture full scope unless. Front line admin burden goes up with automation.
2.Financial benefits (e.g. savings or cost avoidance)		- Suggests limiting this to services where we already have a common system in use (i.e. all services except M&E) - significant time freed-up on data collection for local teams - consolidation and data quality effort saved - Lower financial benefit because this activity is done only quarterly - Could potentially remove the work for the regional Service Area leads who coordinate the collection of data by function. If automated then it goes straight from system back to local user for insights. We should be sure to account for the one time costs to implement automation. - Reduced benefit - only captured quarterly in the market.
3.Improvement of service quality		- Not a major activity of time locally. - report time can decrease from 21 days to significantly faster production - Improving Data/service quality will help us with generating accurate insights (inputs) to the organization decision making process. Also, this will improve our forecast.
4.Efficiency / scalability		- enable producing more frequent report for closer governance (e.g. monthly) - We can also expand to other service area's (CSS, DCE, KO) and other regions (EU, NA)
5.Higher specialization		- more time free-up for analysis of data to the central team (rather than collection/repair) - More time to generate actionable insights. Develop PAN-CO KPI and Demand expertise, with plans to include Financial insights in the future.
6.Improved governance (Ownership, responsibility)		- data ownership transferred to source application / owner of source transaction - will need to build the governance on how the data is used if able to come from a central source directly.
7.Process control, compliance / separation of duty		- not compliance issue however specialization can improve the process control
Overall Benefits	4.1	Very High

- Access to accurate, complete and right data at the right time
- High data standardization and consistency
- Measurable outcomes/insights from the data

* Service definition, involving scope, benefits and complexity ratings will be further refined during following phases

Complexity Assessment	Rating	Justification
1.Reengineering need		- involves major reengineering of the way indicators are collected / corporate application are used - change of the consolidation / dataquality process - We need to get the processes documented, measured and improved. - Very little reengineering will be needed if we limit scope to services based on common tools. - would also involve broader "regional KPI set" changing some metrics. A common complaint locally is that the data in regional KPIs does not match what they are asked to produce or what is relevant locally. If data is pulled from Cvent as an example, some items manually collected on regional KPI are not actually collected by Cvent
2.System impact		- requires fostering the usage of corporate systems (which might lead to some system modifications) - development of direct data extract to feed the indicators - current regional KPI set is Excel-based / would require an appropriate analysis environment (Tableau, Qlikview...) - System automation is key, prior thinking about automation let's get Capable End-to-End processes
3.Importance/size of population concerned		- No system impact if data collection effort is limited to services using common tools - involves CO throughout the region - business indirectly impacted as well as the change implies an acceleration of usage of corporate systems since these provides automated input to regional KPI set
4.Complexity of Deployment		- complex deployment involving many processes in all clusters - deployment can be staggered
5.Change management		- Change management impacting all the corporate systems in making sure source system re used consistently and cannot be shortcut - might lead to some resistances from the business - Overall - A good number of on-going initiatives are linked to regional KPI reporting.
Overall Complexity	4	High

- Data sources silos and not integrated
- Various local and global data standards and elements, lots of key data elements on spreadsheets
- regional KPI reporting and other KPI reporting is highly manual and leverages various data sources

2. M&E Vendor payment services

WIP*

Scope: Process re-engineering needed to remove friction, increase level of centralisation and accelerate deployment to other clusters

Benefit Area	Rating	Justification
1. Lean/waste reduction (e.g. removal of process friction)	5	- elimination of hand-over and frictions between local and SE team - process mode lean - Only if the process is automated. The Gulf has the highest volume of meetings and is the only team supported by SE. As such many of the workflows of the existing team was built around the financial model for the Gulf. The friction will be avoided if redesigned for all markets.
2. Financial benefits (e.g. savings or cost avoidance)	2	- no significant savings can be released - I think there will be savings due to performing the process in a lower cost location (Current Egypt FTEs are at less than 10% of Dubai FTEs in terms of compensation). I would rate this as 4 or 5. - M&E vendors tracking is key to have visibility on financials that will support cost efficiency of decisions.
3. Improvement of service quality	3	- significant quality increase potential through more lean/waste removal - too early to tell based on local service quality measurement for Egypt, KSA, North Africa & South Africa
4. Efficiency / scalability	5	- experience in the shows quality loses its consistency until - increased efficiency driving potential higher throughput for scaling-up
5. Higher specialization	4	- function centralization enabling specialization of payment team delivering payment expertise across region
6. Improved governance (Ownership, responsibility)	4	- centralized payment governance - Audits are local to the markets. Would need to build correct governance of needs to prevent tail from wagging the dog.
7. Process control, compliance / separation of duty	3	- not compliance issue however payments do play a role in the effective compliance of vendors
Overall Benefits	3.7	High

- Highly standardized and centralized process defined, governed and implemented
- Easier to operationalize and accelerate deployment

Complexity Assessment	Rating	Justification
1. Reengineering need	4	- process changes - regional impact on the M&E team - deployment to the complete AfME region - Also needs to be reengineered for whole of AfME - not just existing team
2. System impact	2	- process-level change / systems not impacted - system integrations between Cvent and Ariba may be needed, so i would rate as 2 - Would take into account that all information is done in Cvent and compliance tool. Would need to create proper workflow to ensure no manual duplication if information - Which system do you refer to here. if on the Ariba systems correct but if on the meeting planning process systems there would be change with the handoffs.
3. Importance/size of population concerned	3	- involves M&E team throughout the AfME region
4. Complexity of Deployment	3	- minor complexity deployment, however it can generate some complexity in areas where vendor management is less connected (only if financial systems change)
5. Change management	3	- change management of regional M&E team - might generate some resistances where service perceived as removing some flexibility and control from CO local team - Would not underestimate the change process here. This has been in place for 3 years in the Gulf and still there are perception issues. Most often calls for returning the work to the local users. Also as priority takes place in terms of need, the work can be replaced locally.
Overall Complexity	3	Low

- SLAs not standardized especially payments monitoring and vendor follow ups highly manual
- Various touchpoints with opportunities for automation
- SE partially implemented for some clusters

* Service definition, involving scope, benefits and complexity ratings will be further refined during following phases

3. Onboarding, system and process training, authorizations, access right, user revocation

WIP*

Although many disconnected systems involved, high level of automation can be achieved with RPA/RDA technologies

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)	5	- lean onboarding process for creating access rights - centralized management of profiles/user lifecycle - process-based
2.Financial benefits (e.g. savings or cost avoidance)	3	- NA
3.Improvement of service quality	5	- building block for the change management / fostering usage of corporate applications - user efficiency
4.Efficiency / scalability	4	- increased efficiency of user
5.Higher specialization	4	- centralized team with data admin knowledge on corporate applications
6.Improved governance (Ownership, responsibility)	4	- improved governance - revoking user rights under control
7.Process control, compliance / separation of duty	4	- improved compliance of user access / enforce some better auditability of who's doing what on corporate systems
Overall Benefits	4.1	Very High

Complexity Assessment	Rating	Justification
1.Reengineering need	4	- process definition - re-engineering of onboarding and user admin processes - etc.
2.System impact	3	- might require additional tools to integrate the user management across platforms and ensure consistency of profiles
3.Importance/size of population concerned	3	- CO team concerned
4.Complexity of Deployment	3	- deployment can be staggered
5.Change management	3	- CO population concerned - launch of a central SE function - highly process-based (loads of procedures to build)
Overall Complexity	3.2	Medium

- Highly standardized and centralized process defined, governed and implemented
- Improve productivity and efficiency with high level of automation with RPA

- Various disconnected systems involved
- No standardized service catalog with published SLAs shared with the business for the onboarding service
- SE partially implemented for some clusters

* Benefits and complexity will be further refined during following phases

4. Content compliance

WIP*

Scope: Compliance process review for the training content (ensure up-to-date, etc.) – focus on brand-training

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)		- This is the heart of the issue. There is process friction in the current set up now. If this is not improved then the exercise becomes a waste. 4
2.Financial benefits (e.g. savings or cost avoidance)		3- NA
3.Improvement of service quality		- some service quality improvement through a more centralized monitoring of Content Compliance 4
4.Efficiency / scalability		- Centralization of the content compliance might create bottlenecks and scalability issues 2
5.Higher specialization		- increased professionalism through aggregation of knowledge in. Centralized function and proper application of compliance processes (global promo-review tool?) 4
6.Improved governance (Ownership, responsibility)		- monitoring of a closed-loop process 5- elimination of operational risks
7.Process control, compliance / separation of duty		- Compliance of training content under centralized monitoring 5- can be controlled / auditable
Overall Benefits	3.9	High

Complexity Assessment	Rating	Justification
1.Reengineering need		- some procedures to build, however for restricted scope - has to adapt to various needs (geographies, business...) 3- integration within content management workflow
2.System impact		- tool to setup for monitoring content compliance - has to be integrated within content management workflow 3involving several tools already
3.Importance/size of population concerned		- CO / TR function 4- marketing / Business who do provide content on Brand training
4.Complexity of Deployment		- deployment can be staggered 3- limited piece of functionality involved
5.Change management		- resistances expected from business when getting brand-based content under control 4- value-proposition to be articulated
Overall Complexity	3.4	Medium

- Consolidation of services around content compliance especially around content approvals and reviews to minimize too many touch points

- Local country compliance training requirements especially around brand training and medical compliance

* Service definition, involving scope, benefits and complexity ratings will be further refined during following phases

5. Training planning, organization and execution

WIP*

LMS deployment / change management to complete. Clarification of CO role on brand training + foster collaboration with marketing/cbl to clear-out shadow function

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)	3	- NA
2.Financial benefits (e.g. savings or cost avoidance)	4	- significant expected savings in offloading administration activities from training managers to a central admin structure - Should reduce cost due to using less skilled resources
3.Improvement of service quality	4	- elimination of shadow activities (brand training covered by business) will drive service quality improvement and efficiency gains at (Group level)
4.Efficiency / scalability	4	- Setting-up training as a fully central organization might create some inefficiency
5.Higher specialization	3	- higher level of organisational professionalism toward training organisation
6.Improved governance (Ownership, responsibility)	4	- enables central AfME-level training governance - better control of resources and hidden costs (e.g. elimination of shadow functions) - better management of trainers client-facing time
7.Process control, compliance / separation of duty	4	- the impact on process controls and compliance of CFC will be positive due to effective training management
Overall Benefits	3.7	High

- Increase in a standardized and centralized process defined, governed and implemented
- Easier to operationalize and accelerate deployment

* Benefits and complexity will be further refined during following phases

Complexity Assessment	Rating	Justification
1.Reengineering need	2	- involves some re-engineering of the function to satisfy needs of Skills and Brand trainers/trainees
2.System impact	2	- no system impact perceived apart from ensuring a consistent usage of corporate training systems (LMS...) across the region
3.Importance/size of population concerned	4	- CO / TR function - marketing / Business who do provide content on Brand training
4.Complexity of Deployment	3	- important piece of functionality to shift to SE team - elimination of shadow function - setup of a centralized governance
5.Change management	4	- resistences expected - will impact the business - can be perceived as some form of regression for Just-In Time training that will need to be addressed
Overall Complexity	3	Low

- More complex vs. other services due to poor user adoption of the LMS in AFME and lack of process awareness
- Confusion of CO role vs marketing/CBL shadow function for brand training

6. Promotional Operations

WIP*

Most mature / standardized and centralized function which has a single source of Promotional Materials

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)	3	- NA
2.Financial benefits (e.g. savings or cost avoidance)	3	- NA
3.Improvement of service quality	3	- global promo-review process already centralized in essence however transfer to SE would accelerate deployment to countries / clusters where not already used and increase service quality - No additional benefit with all markets currently utilizing global promo-review tool. Would reduce to average.
4.Efficiency / scalability	4	- make it easier to scale-up with a consistent global promo-review process across AfME
5.Higher specialization	3	- NA
6.Improved governance (Ownership, responsibility)	4	- better control of process execution overall
7.Process control, compliance / separation of duty	3	- NA
Overall Benefits	3.3	Medium

- global promo-review process already centralized and well applied

Complexity Assessment	Rating	Justification
1.Reengineering need	2	- procedured process already in place (global promo-review tool) - no major anticipated changes
2.System impact	2	- Leverage existing system
3.Importance/size of population concerned	4	- Involves CO and business population across the region
4.Complexity of Deployment	3	- no major areas of complexity perceived for the deployment - Local Regulations (Reg 08) drive the complexity of management beyond systems and reporting.
5.Change management	4	- change management of regional SMS team - might generate some resistances where service perceived as removing some flexibility and control - will impact customers who might not perceive immediate value proposition to them
Overall Complexity	3	Low

- Possible low-hanging fruit

* Benefits and complexity will be further refined during following phases

7. Content management

WIP*

Localisation of global content (skills training) – identify and add-up brand training to catalogue

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)		- will create some complexity by adding an extra layer between content owner and content manager (at least for brand training) 3- Only regionalizing global content but not localizing in markets
2.Financial benefits (e.g. savings or cost avoidance)		- elimination of redundencies 3- better control and monitoring of content management costs
3.Improvement of service quality		- improved predictability of service performance - SLA's - better control of brand content - enforced consistent usage of the LMS - Depending on the definition of quality in this case. Training is more of an art than a science. Some of the best trainers we have do not use the standard material so even centralized content would be edited by them. If I told them they could only train in a certain way, then I decrease their value. 3
4.Efficiency / scalability		4- optimized function making it easier to scale-up across the region
5.Higher specialization		- content management performed remotely from training managers might remove the intimacy between content and country and make it less relevant 2
6.Improved governance (Ownership, responsibility)		4- improve governance of interactions with Marketing and CBL fro brand training
7.Process control, compliance / separation of duty		3 NA
Overall Benefits	3.1	Medium

Complexity Assessment	Rating	Justification
1.Reengineering need		- function is currently not process-based nor structured - effort to develop process procedures 4 important
2.System impact		2- minor impact on system perceived
3.Importance/size of population concerned		4- Involve both TR team and the business for creation of cntent
4.Complexity of Deployment		4- major transformation on the way brand content is managed (control, ownership...)
5.Change management		- value of the process might not be immediately perceived by the business - resistences anticipated 3- complexity to hand-over a business critical responsibility from business to support
Overall Complexity	3.4	Medium

- Centralization of Local vs global content creation and management the Content Library
- Adhoc training requests which causes unplanned content creation

* Benefits and complexity will be further refined during following phases

8. Procurement compliance, anti-corruption compliance

WIP*

Central compliance-tool service. Central storage of document evidences, process approvals... for auditability

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)	5	- very high since there is duplication in effort for both training and prepping local teams to run these processes in their markets, and for ensuring standard quality across markets.
2.Financial benefits (e.g. savings or cost avoidance)	4	- very high since several resources run this processes in all markets (especially Gulf and Saudi where our costs are the highest).
3.Improvement of service quality	3	- service speed and process agility may be impacted - very high in terms of adhering to a standard process - client perception will be different because they value the flexibility, but this degrades quality and impacts compliance negatively.
4.Efficiency / scalability	4	- might create central bottleneck for meeting compliance approvals, etc. - very high because we will not be limited to local resources, especially in smaller markets. The bottleneck is not in the centralization, but is a perception by clients who value the flexibility and convenience of having a local resource who can respond at any time. This itself is not scalable or efficient and needs to be changed.
5.Higher specialization	4	- Process owners / compliance officers having a deeper experience and regional-wide view of compliance issues that would make them more efficient at proactively detecting operational risks and fraudulent cases - current shared service model leads to higher churn, not specialization. Procurement has not yet aligned to be centralized so handoffs with the external stakeholders still would be local.
6.Improved governance (Ownership, responsibility)	4	- central governance / monitoring of compliance activity - easier to manage rules - consistent level of compliance scrutiny across AfME
7.Process control, compliance / separation of duty	5	- enforced segregation of duty - process management performed outside of local influence - reduction of operational risks - better management of compliance observation rules across region - Compliance is at the heart of what we do. Believe there is value here depending on the size of the market.
Overall Benefits	4.1	Very High

- compliance tool is a global compliance tool that could help adopt standardization in processes and centralization of function
- Central storage and archiving of compliance relevant documents and approvals

* Benefits and complexity will be further refined during following phases

Complexity Assessment	Rating	Justification
1.Reengineering need	4	- compliance-tool process already existing and mature however compliance-tool process needs to be reengineered to enable efficient SE process. - some adaptations required but minor when moving to SE team
2.System impact	2	- no system impact anticipated
3.Importance/size of population concerned	4	- Business impacted - CO M&E team impacted - close direct engagement today with clients across all markets.
4.Complexity of Deployment	4	- some new procedures might be needed - training of the SE team - regulatory and business critical will require careful planning and transition
5.Change management	4	- resistance anticipated if function creates rigidity in travel expenses approval / reimbursement or others
Overall Complexity	3.6	High

- Local country legal and procurement laws
- Some procurement vendor activities require onsite presence to coordinate

9. Meeting planning and organization

WIP*

Works hand-in-hand with Payment services to maximise benefits- Cvent roll-out completion and change management is a dependency

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)	4	- waste and friction reduction by transferring meeting management to same party which is processing payments
2.Financial benefits (e.g. savings or cost avoidance)	4	- some degrees of savings through the elimination of redundant / shadow functions - however not main driver
3.Improvement of service quality	2	- remote function getting geographically far from local markets / vendors and HCP, might lose some degree of intimacy and become more bureaucratic - last minute meetings might become less easy to schedule / organise
4.Efficiency / scalability	4	- If we move to a vendor or managed service, significant potential for scalability. - central organization model is more scalable
5.Higher specialization	4	- higher level of specialization / industrialization by managing a larger portfolio of M&E - Process specialization
6.Improved governance (Ownership, responsibility)	4	- easier to setup / monitor SLA on meetings organisation - better control of KPI - further enforcement of consistent usage of Cvent throughout the region
7.Process control, compliance / separation of duty	3	- NA
Overall Benefits	3.6	High

Complexity Assessment	Rating	Justification
1.Reengineering need	4	- procedures to develop - re engineer function and interface with client
2.System impact	2	- some minor adaptation to existing systems anticipated to enable central SE team to provide service
3.Importance/size of population concerned	4	- involves both M&E and Business - regional AfME deployment
4.Complexity of Deployment	4	- impact business and M&E team - might generate direct impact on the way business is booking events (self serving) - With Cvent and on-demand tool already in place this should be less complex.
5.Change management	4	- change management of regional M&E team - might generate some resistances where service perceived as removing some flexibility and control - will impact customers who might not perceive immediate value proposition to them - tentative to make it transparent - however difficult
Overall Complexity	3.6	High

- Some levels of standardization exist due to Cvent rollout
- Increase in a standardized and centralized process defined, governed and implemented
- Easier to operationalize and accelerate deployment

* Benefits and complexity will be further refined during following phases

- Less complex vs. others services especially with Cvent and DocuSign rollout
- SE partially implemented for some clusters

10. Certification Management

WIP*

Central repository of certified Sales Rep / brands / etc. with tracking of training refresh

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)		- centralized versus current approach where local training managers need to process.
2.Financial benefits (e.g. savings or cost avoidance)	3	- NA
3.Improvement of service quality	4	- might lose some degree of local process ownership / accountability on certification management - I expect this to be higher because it will be done in a consistent and standard way - today it is not done effectively in all markets
4.Efficiency / scalability	3	- NA
5.Higher specialization	3	- NA
6.Improved governance (Ownership, responsibility)	4	- strong central governance of certification - better tracking and reminder
7.Process control, compliance / separation of duty	4	- Better control of certification compliance
Overall Benefits	3.6	High

Complexity Assessment	Rating	Justification
1.Reengineering need	2	- minor procedural re-engineering
2.System impact	3	- Some simple tool to adapt or make available for reporting / monitoring of certifications
3.Importance/size of population concerned	4	- Business impacted - CO Training team impacted
4.Complexity of Deployment	3	Simple deployment in SE of a centralized function that is already hosted centrally within TR
5.Change management	4	- impact on the business certification
Overall Complexity	3.2	Medium

- Centralization of tracking certificates with the LMS, in addition alignment with curricula

- Tracking of training refreshes maybe challenging with a fragmented workforce

* Benefits and complexity will be further refined during following phases

11. Training Needs consolidation

WIP*

End-to-end training needs analysis process, including IDP and coaching

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)	2	- adding an additional consolidation layer
2.Financial benefits (e.g. savings or cost avoidance)	3	- NA
3.Improvement of service quality	4	- enables a better understanding and more consistent view of training needs across the region - consolidation is faster and removes excel-based / outlook-based processing 4- faster feed-back enabled to business
4.Efficiency / scalability	4	- foster utilization of the TNA tool across AfME
5.Higher specialization	3	- NA
6.Improved governance (Ownership, responsibility)	2	- People managers' ownership is critical
7.Process control, compliance / separation of duty	3	- NA
Overall Benefits	3.0	Low

Complexity Assessment	Rating	Justification
1.Reengineering need	2	- minor procedural re-engineering
2.System impact	3	- Some simple tool to adapt or make available for reporting / monitoring of certifications
3.Importance/size of population concerned	4	- TR team 4- business
4.Complexity of Deployment	2	Simple deployment in SE of a centralized function that is already hosted centrally within TR
5.Change management	2	- no major resistences identified at this stage
Overall Complexity	2.6	Low

- Complete Advance Program with alignment of IDP adoption increased with centralization
- Staff turn-over may increase complexity to harmonize

* Benefits and complexity will be further refined during following phases

12. Sample management

WIP*

Sample management in the new SFA platform with centralise budget approval and sample distribution workflows

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)		- focusing on "tracking" and not full management - this would increase benefit rating and decrease complexity rating
2.Financial benefits (e.g. savings or cost avoidance)	3	- NA
3.Improvement of service quality	2	- create some additional layer of management for sample Supply Chain
4.Efficiency / scalability	3	- NA
5.Higher specialization	3	- NA
6.Improved governance (Ownership, responsibility)	4	- better monitoring of the sampling process
7.Process control, compliance / separation of duty	3	- NA
Overall Benefits	3.1	Medium

Complexity Assessment	Rating	Justification
1.Reengineering need	3	-Already highly procedured function - only minor customization expected - creation of a new function at SE team
2.System impact	3	- some minor adaptation to existing systems anticipated to enable central SE team to provide service - Consideration should be higher for distributor markets.
3.Importance/size of population concerned	4	- involves both SMS and Business - regional AfME deployment
4.Complexity of Deployment	3	- impact both business and the SMS team
5.Change management	4	- Value proposition is not clear at this stage on the business benefits and might create some challenges in change management
Overall Complexity	3.4	Medium

- Transition from fragmented sampling processes and tools to centralization with the new SFA platform

- Sample management process complexity, distributors vs direct sales force varies in each country

* Benefits and complexity will be further refined during following phases

13. Vendor payment services (Training)

WIP*

Extension of Meeting Payment Services to other processes requiring external services (e.g. training)

Benefit Area	Rating	Justification
1.Lean/waste reduction (e.g. removal of process friction)	2	split the training organisation into two different parties
2.Financial benefits (e.g. savings or cost avoidance)	3	NA
3.Improvement of service quality	3	NA
4.Efficiency / scalability	3	NA
5.Higher specialization	3	NA
6.Improved governance (Ownership, responsibility)	3	NA
7.Process control, compliance / separation of duty	3	NA
Overall Benefits	2.9	Low

Complexity Assessment	Rating	Justification
1.Reengineering need	4	- process changes - regional impact on the M&E team - deployment to the complete AfME region - can leverage some material / processes for M&E
2.System impact	3	- might require some minor changes / interfaces in the existing training booking workflow
3.Importance/size of population concerned	3	-TR team concerned
4.Complexity of Deployment	4	- medium scale complexity deployment (regional, however only TR concerned) but population and processes are heterogenous - can generate some resistences whre perceived the re-engineered process would create some rigidity for Ad-hoc trainings
5.Change management	3	- TR population concerned - resistences anticipated if process generates limtations for Ad-Hoc trainings - might lead to a wider area of changes if training management not embedded in SE team
Overall Complexity	3.4	Medium

- Consolidation to leverage vendor payments experience and team around M&E payments services

* Benefits and complexity will be further refined during following phases

- Some vendor payment activities require onsite presence to coordinate

Benefits Assessment

#		Service Group	1.Lean/waste reduction (e.g. removal of process friction)	2.Financial benefits (e.g. savings or cost avoidance)	3.Improvement of service quality	4.Efficiency / scalability	5.Higher specialization	6.Improved governance (Ownership, responsibility)	7.Process control, compliance / separation of duty	Average Benefits	Benefits rating
1	Regional KPI reporting	Across CO Services	4	3	5	5	4	4	4	4.1	Very High
3	Onboarding and User Admin	Across CO Services	5	3	5	4	4	4	4	4.1	Very High
8	Procurement Compliance	Meeting & Events	5	4	3	4	4	4	5	4.1	Very High
4	Content Compliance	Training	4	3	4	2	4	5	5	3.9	High
2	M&E Vendor Payment	Meeting & Events	5	2	3	5	4	4	3	3.7	High
5	Training Organisation	Training	3	4	4	4	3	4	4	3.7	High
9	Meeting Planning & Organisation	Meeting & Events	4	4	2	4	4	4	3	3.6	High
10	Certification Management	Training	4	3	4	3	3	4	4	3.6	High
6	Promotional Operations	Sales & Marketing	3	3	3	4	3	4	3	3.3	Medium
7	Content Management	Training	3	3	3	4	2	4	3	3.1	Medium
12	Sample Management	Sales & Marketing	4	3	2	3	3	4	3	3.1	Medium
11	Training Needs Consolidation	Training	2	3	4	4	3	2	3	3.0	Low
13	Training Payment Services	Training	2	3	3	3	3	3	3	2.9	Low

- 1 Major decrease
- 2 Moderate decrease
- 3 Similar or non ratable
- 4 Minor Improvements
- 5 Major Improvements

>4 : Very High
 >3.5 : High
 >3 : Medium
 <=3 : Low

Complexity Assessment

#	Service Name	Service Group	1.Reengineering need	2.System impact	3.Importance/ size of population concerned	4.Complexity of Deployment	5.Change management	Average Complexity	Complexity rating
1	Regional KPI reporting	Across CO Services	4	4	4	4	4	4	High
9	Meeting Planning & Organisation	Meeting & Events	4	2	4	4	4	3.6	High
8	Procurement Compliance	Meeting & Events	4	2	4	4	4	3.6	High
7	Content Management	Training	4	2	4	4	3	3.4	Medium
4	Content Compliance	Training	3	3	4	3	4	3.4	Medium
13	Training Payment Services	Training	4	3	3	4	3	3.4	Medium
12	Sample Management	Sales & Marketing	3	3	4	3	4	3.4	Medium
10	Certification Management	Training	2	3	4	3	4	3.2	Medium
3	Onboarding and User Admin	Across CO Services	4	3	3	3	3	3.2	Medium
5	Training Organisation	Training	2	2	4	3	4	3	Low
2	M&E Vendor Payment	Meeting & Events	4	2	3	3	3	3	Low
6	Promotional Operations	Sales & Marketing	2	2	4	3	4	3	Low
11	Training Needs Consolidation	Training	2	3	4	2	2	2.6	Low

- 1 No impact
- 2 Minor / limited change
- 3 Significant changes / limited scale
- 4 Significant changes / large scale
- 5 Major / FOAK large scale transformation

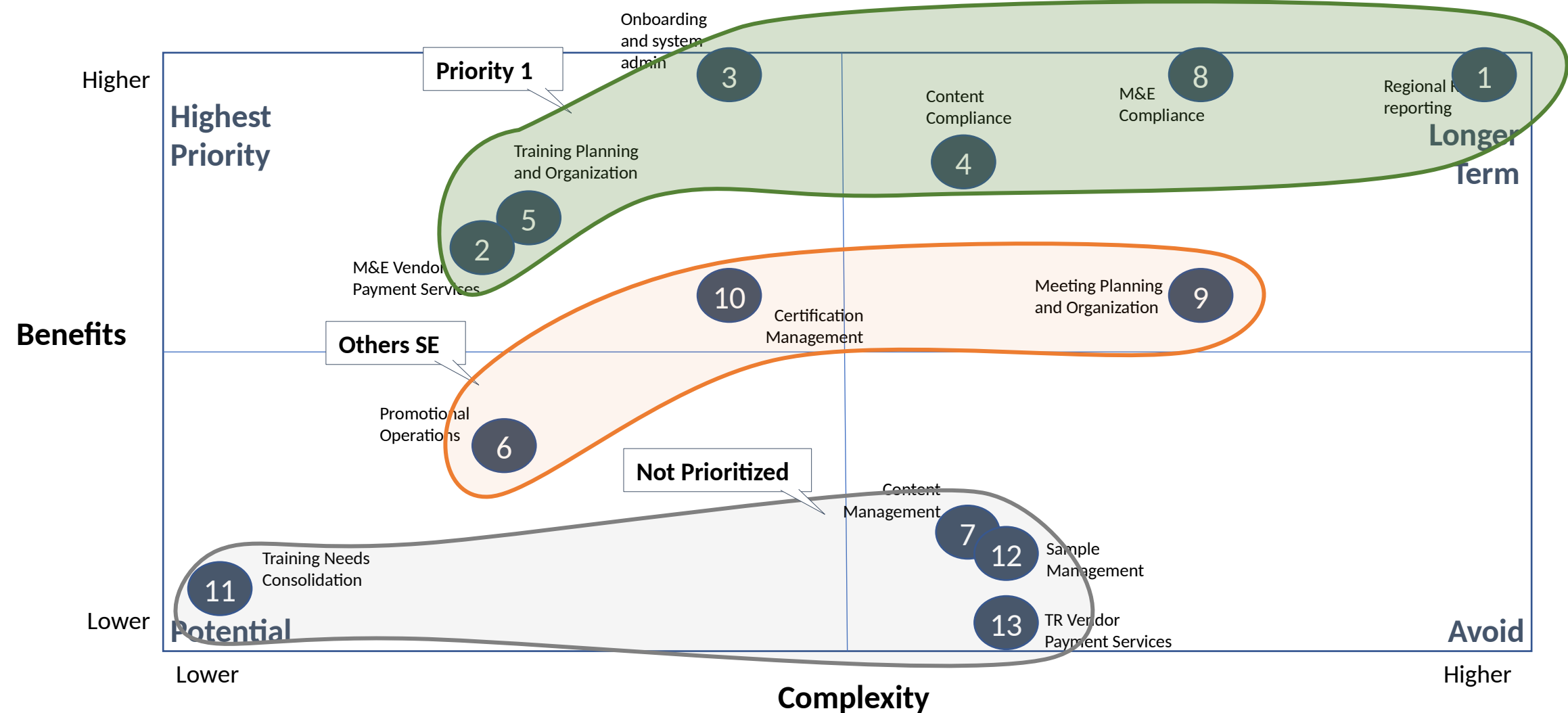
>4 : Very High
 >3.5 : High
 >3 : Medium
 <=3 : Low

Benefits v. Complexity Matrix

	Benefits rating		Average Benefits		Complexity rating
1	Regional KPI reporting	4.1	Very High	4	High
2	M&E Vendor Payment	3.7	High	3	Low
3	Onboarding and User Admin	4.1	Very High	3.2	Medium
4	Content Compliance	3.9	High	3.4	Medium
5	Training Organisation	3.7	High	3	Low
6	Promotional Operations	3.3	Medium	3	Low
7	Content Management	3.1	Medium	3.4	Medium
8	Procurement Compliance	4.1	Very High	3.6	High
9	Meeting Planning & Organisation	3.6	High	3.6	High
10	Certification Management	3.6	High	3.2	Medium
11	Training Needs Consolidation	3.0	Low	2.6	Low
12	Sample Management	3.1	Medium	3.4	Medium
13	Training Payment Services	2.9	Low	3.4	Medium

Prioritization matrix

- Priority 1 Candidates
- Other SE Candidates
- Not prioritized



5 CO candidates with short-term benefits and 6 longer-term candidates are proposed for onboarding to the SE team

Priority 1 Candidates
 Other SE Candidates
 Not prioritized

	Meeting& Events	Training	Sales and Marketing Services	Digital Channel Enablement
Setup and user admin	Onboarding, system and process training, authorizations, access right, user revocation*			
Data management and performance / service quality reporting	Data Quality, data extraction/automation, regional KPI reporting, service performance, service quality and report distribution			
Planning, booking, application and execution management	Meeting planning and organization	Training planning, organisation and execution	Promotional operations	Sample management
Content Services		Needs consolidation	Content management	
Payment	Vendor payment services	Vendor payment services		
Compliance Management	Procurement compliance, anti-corruption compliance	Certification management	Content compliance	

* Service to be analysed during the TOM Definition phase

Planned next steps

- | | |
|--|----------|
| 1. Validate scores | Reviewed |
| 2. Agree on priority candidates / validate analysis | Today |
| 3. Kick-off the next phase | |
| 1. Refine the approach and deliverable definition for the SE TOM definition phase and confirm two-pronged approach | Done |
| 2. Schedule TOM definition workshops | Today |
| 4. Complete analysis for the items left-over: | |
| 1/ System and Process Admin (To be scheduled in September with the DCE lead) | Done |
| | Ok |
| 5. Continue to refine the scoring as more information is learnt (keep it as a live document) | |

It is recommended to focus the SE TOM Definition on the priority SE candidates whilst developing a high-level view on other candidates for completeness and consistency



End of the Document

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