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HOP  PEOPLE
PURPOSE
PERFORMANCE
SUMMIT 2025

BUILDING A **PROCESS-FIRST** APPROACH TO SOLUTION DELIVERY

DLK GROUP | ETIENNE VENTER

IPMA HOPE SUMMIT 25 | NOVEMBER 2025



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CONTENTS

Executive Summary

ERP Implementation: Success vs Failure

Process-First Solution Delivery Overview

Phase 1: Initiate

Phase 2: Construction

Phase 3: Transition

Phase 4: Operate

Process-First Solution Delivery Benefits

Questions and Closing

Thank you

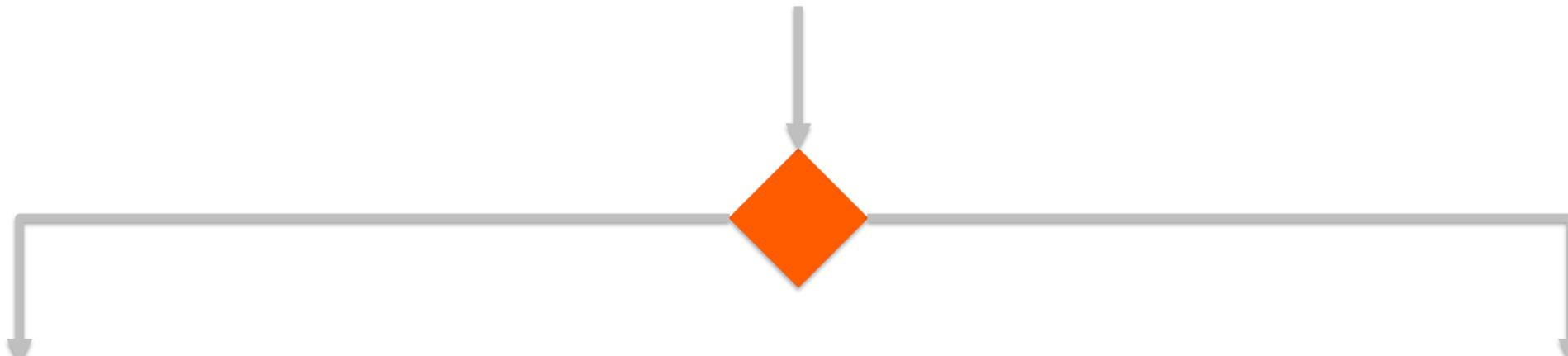


EXECUTIVE SUMMARY



“Let me start with a quick question. ***As a project manager / or business manager, could you show me, right now, the processes your team follows, the applications they use, the work instructions they rely on, and the policies or regulations that guide them?***”

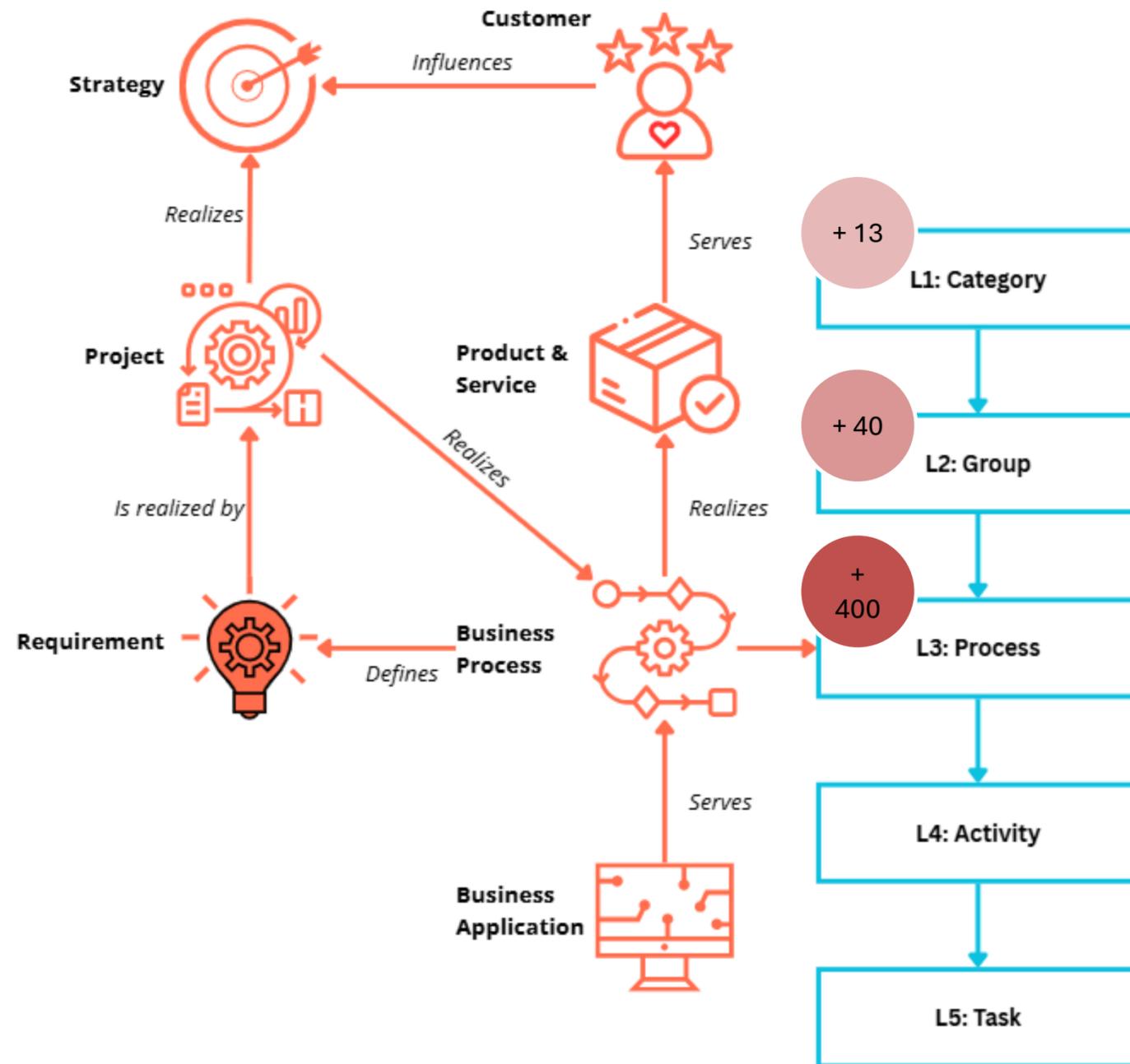
“Let me start with a quick question. ***As a project manager / or business manager, could you show me, right now, the processes your team follows, the applications they use, the work instructions they rely on, and the policies or regulations that guide them?***”



if your answer is **no**, then it's time to start investing in a process-first approach .

If your answer is **yes**, then you already have the foundation for a process-first approach to solution delivery.

EXECUTIVE SUMMARY



Your Organization

 Aerospace and Defense Download Now	 Airline Download Now	 Automotive Download Now
 Banking Download Now	 Broadcasting Download Now	 City Government Download Now
 Consumer Electronics Download Now	 Consumer Products Download Now	 Corrosion Download Now
 Downstream Petroleum Download Now	 Education Download Now	 Healthcare Provider Download Now

ERP IMPLEMENTATION: SUCCESS VS. FAILURE



1. Coca-Cola Bottling Co. Consolidated (USA) - SAP S/4HANA

Key Success Factor: Deep process mapping and adoption of standard SAP process templates.

2. Boeing – SAP

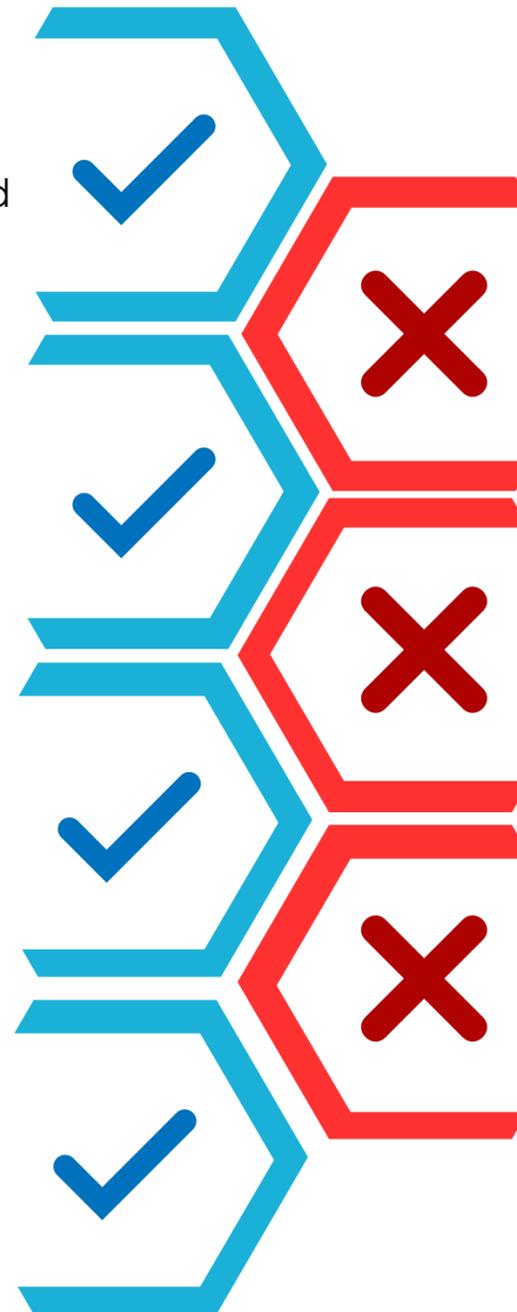
Key Success Factor: ERP as part of broader process improvement initiative, not just a tech upgrade.

3. Nestlé USA – SAP

Key Success Factor: Process ownership and executive commitment to change management.

4. Volvo Group – Microsoft Dynamics 365 Finance & Operations

Key Success Factor: Harmonization of processes before technology rollout.



1. Lidl (Germany) – SAP Failure

Consequence: Excessive customisation attempts led to **€500+ million wasted** before scrapping the project.

Lesson: Lidl didn't critically evaluate whether their legacy processes could (or should) be retained within SAP's best practice framework.

2. Target Canada – Oracle-based Custom ERP

Consequence: **\$2 billion in losses**, with the company eventually exiting Canada.

Lesson: They lacked operational maturity and accurate internal process definitions to support a full ERP rollout.

3. Spar Group (South Africa) – SAP

Consequence: **R1.6 billion in lost turnover, R720 million in lost profit (2023).**

Lesson: Align ERP implementations with well-documented, validated internal processes to avoid operational and financial collapse.

PROCESS-FIRST SOLUTION DELIVERY OVERVIEW

PROCESS-FIRST SOLUTION DELIVER OVERVIEW



Initiate

Define Vision



Define In-Scope Processes

- Plan Merchandise
- Procure Inventory
- Manage Inventory
- Set Pricing and Promotions
- Allocate Stock



Define Activities (Features) for 1st few prioritized processes



Analyze Performance

Set Goals

Forecast Demand

Plan Budget

Process Based Product Backlog (EPICS + Features)

Construction

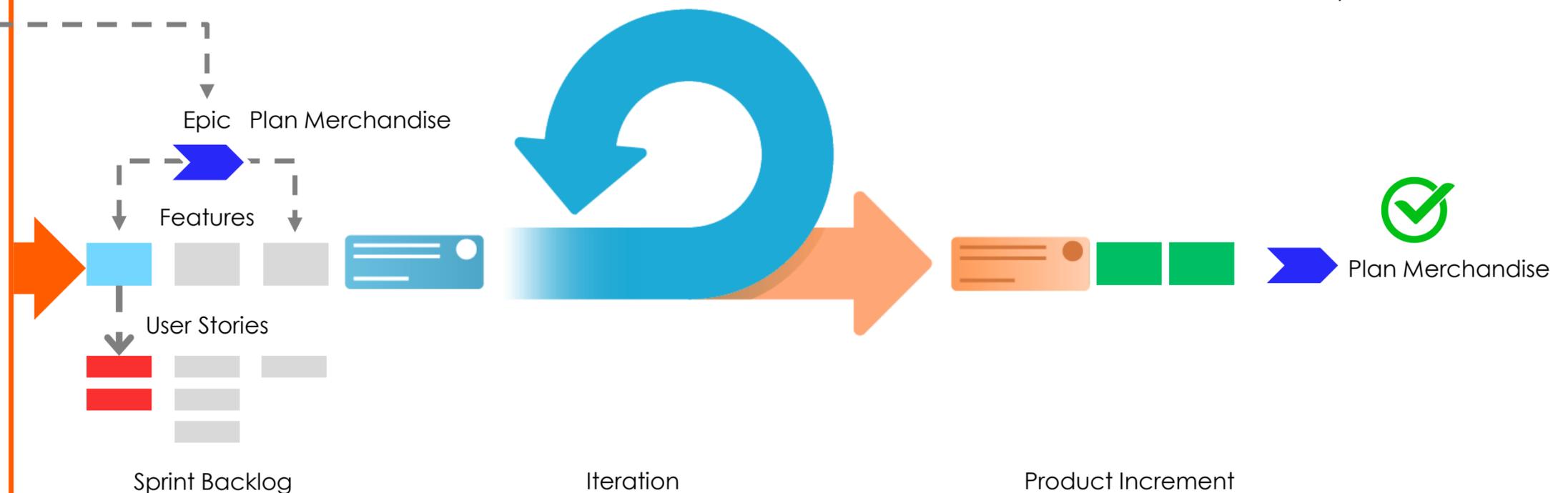
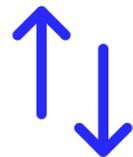
During the construction phase in Scrum, the team plans the sprint, holds daily scrums, designs and builds features, performs continuous testing, refines the backlog, reviews progress with stakeholders, and conducts retrospectives to improve.

Transition

Run end-to-end testing for each process
Train users by process and role
Validate that each process is fully supported

Operate

Ensure process adoption
Monitor system health
Collect process-specific metrics
Refine processes and update stories for next cycles



PHASE 1: **INITIATE**



INITIATE



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Define Vision



Vision Statement

To deliver a cutting-edge Merchandise Management System that optimizes inventory, enhances operational efficiency, and drives seamless omnichannel customer experiences through data-driven insights and streamlined processes.

Process	Strategic Goals	Operational Goals	Financial Goals	Technical Goals
Plan Merchandise	<ul style="list-style-type: none"> Enhance planning accuracy with predictive analytics. Support omnichannel retail. 	<ul style="list-style-type: none"> Enable data-driven decisions with analytics. Increase inventory turnover. 	<ul style="list-style-type: none"> Boost profitability via optimized margins. 	<ul style="list-style-type: none"> Ensure scalability and integration with ERP/CRM. Drive user adoption with intuitive tools.
Procure Inventory	<ul style="list-style-type: none"> Strengthen supplier collaboration via real-time integration. 	<ul style="list-style-type: none"> Streamline core processes (e.g., purchasing). 	<ul style="list-style-type: none"> Lower operational costs through efficient supplier terms. 	<ul style="list-style-type: none"> Ensure scalability and integration with supplier systems. Maintain data security for vendor data.
Manage Inventory	<ul style="list-style-type: none"> Support omnichannel retail with unified visibility. 	<ul style="list-style-type: none"> Automate inventory tracking and replenishment. Increase inventory turnover. 	<ul style="list-style-type: none"> Boost profitability by reducing overstock. Lower costs by minimizing shrinkage. 	<ul style="list-style-type: none"> Ensure integration with supply chain systems. Maintain data security for inventory records.



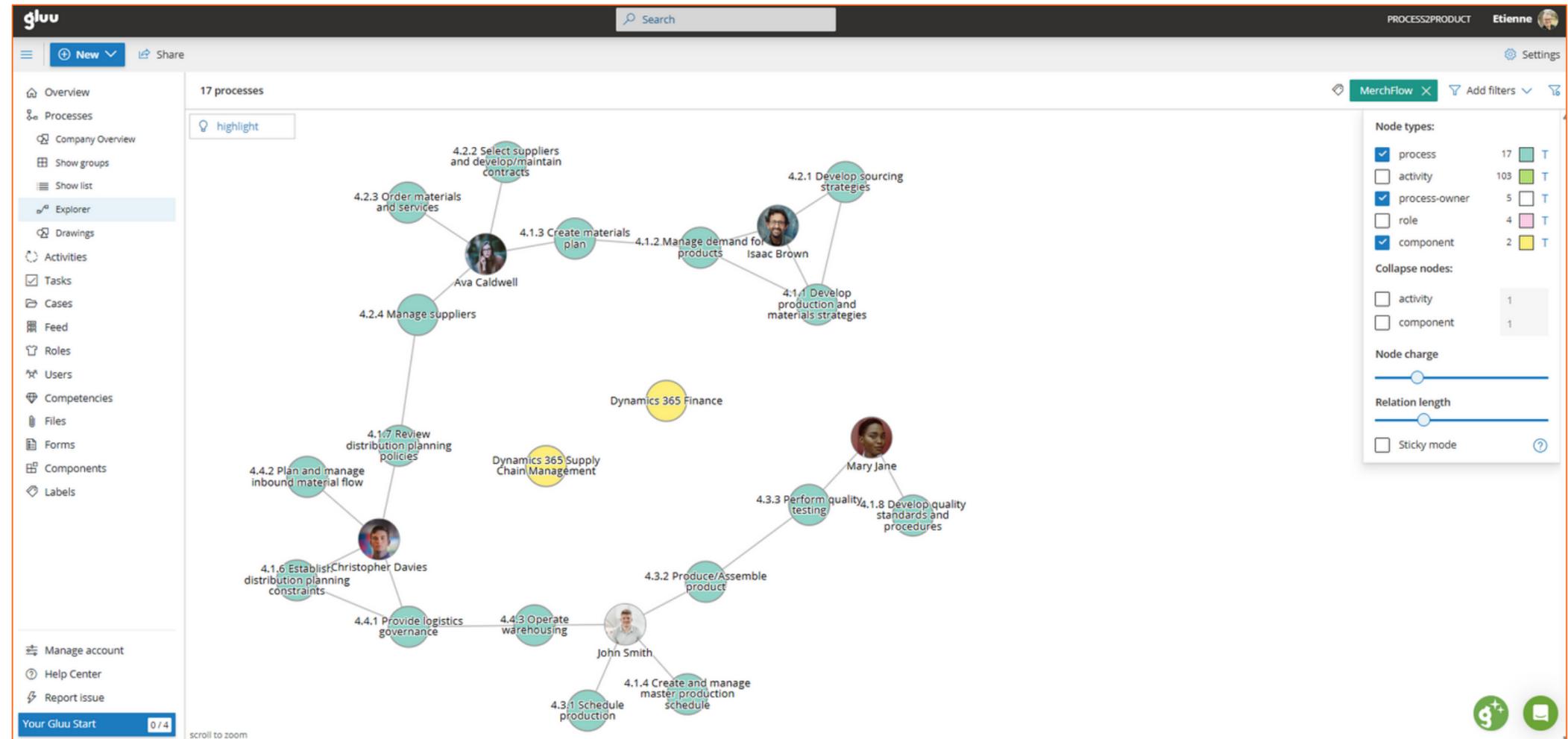
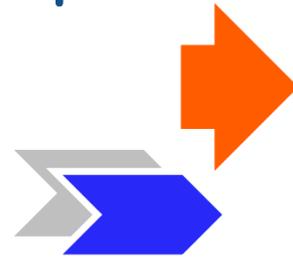
INITIATE



Define Vision

Define In-Scope Processes

- Plan Merchandise
- Procure Inventory
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- Allocate Stock



In-scope Processes, Process Owners, and Components (i.e. Applications)



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Define Vision



Define In-Scope Processes

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Define Activities (Features) for 1st few prioritized processes

Plan Merchandise



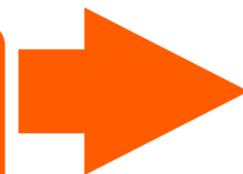
Analyze Performance

Set Goals

Forecast Demand

Plan Budget

Process Based Product Backlog (EPICS + Features)



The screenshot shows the Gluu software interface. On the left is a navigation menu with options like Overview, Processes, Company Overview, Explorer, Drawings, Activities, Tasks, Cases, Feed, Roles, Users, Competencies, Files, Forms, Components, and Labels. The main area displays a process map for '4.2.1 Develop sourcing strategies' with nodes for '4.2.2 Select suppliers and develop/maintain contracts', '4.2.3 Order materials and services', '4.1.3 Create materials plan', '4.1.2 Manage demand for products', '4.1.1 Develop production and materials strategies', '4.2.4 Manage suppliers', '4.1.7 Review distribution planning policies', '4.4.2 Plan and manage inbound material flow', '4.1.6 Establish distribution planning constraints', '4.4.1 Provide logistics governance', '4.4.3 Operate warehousing', '4.3.1 Schedule production', '4.1.4 Create and manage master production schedule', '4.3.2 Produce/Assemble product', '4.3.3 Perform quality testing', and '1.8 Develop quality standards and procedures'. Roles like Ava Caldwell, Isaac Brown, Mary Jane, and John Smith are associated with different parts of the process. On the right, a detailed view of '4.2.1 Develop sourcing strategies' shows an outcome, a process map with steps like '4.2.1.5 Analyze organization's spend profile' and '4.2.1.6 Seek opportunities to improve efficiency and value', and a list of 7 activities. The owner is listed as Isaac Brown.

Process Activities & Responsible Roles



INITIATE



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Define Vision



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Define Activities (Features) for 1st few prioritized processes

Plan Merchandise



Analyze Performance

Set Goals

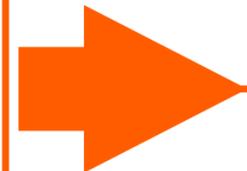
Forecast Demand

Plan Budget

Process Based Product Backlog (EPICS + Features)

The screenshot displays the Gluu software interface. The main area shows a process map for '4.2.1 Develop sourcing strategies' with the following steps: 'Business need identified' (start), '4.2.1.5 Analyze organization's spend profile' (Procurement Analyst), '4.2.1.2 Clarify purchasing requirements' (Procurement Specialist), '4.2.1.4 Match needs to supply capabilities' (Supply Chain Manager), '4.2.1.7 Collaborate with suppliers to identify sourcing opportunities' (Supply Chain Manager), '4.2.1.6 Seek opportunities to improve efficiency and value' (Procurement Analyst), and '4.2.1.1 Develop procurement plan' (Procurement Specialist). The right-hand panel shows a 'Suggestions' list with three user stories, all marked as 'Approved' and dated 12 May 2025.

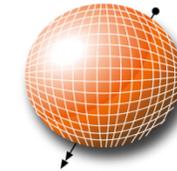
Process, Features (Activities) & User Stories



PHASE 2: CONSTRUCTION

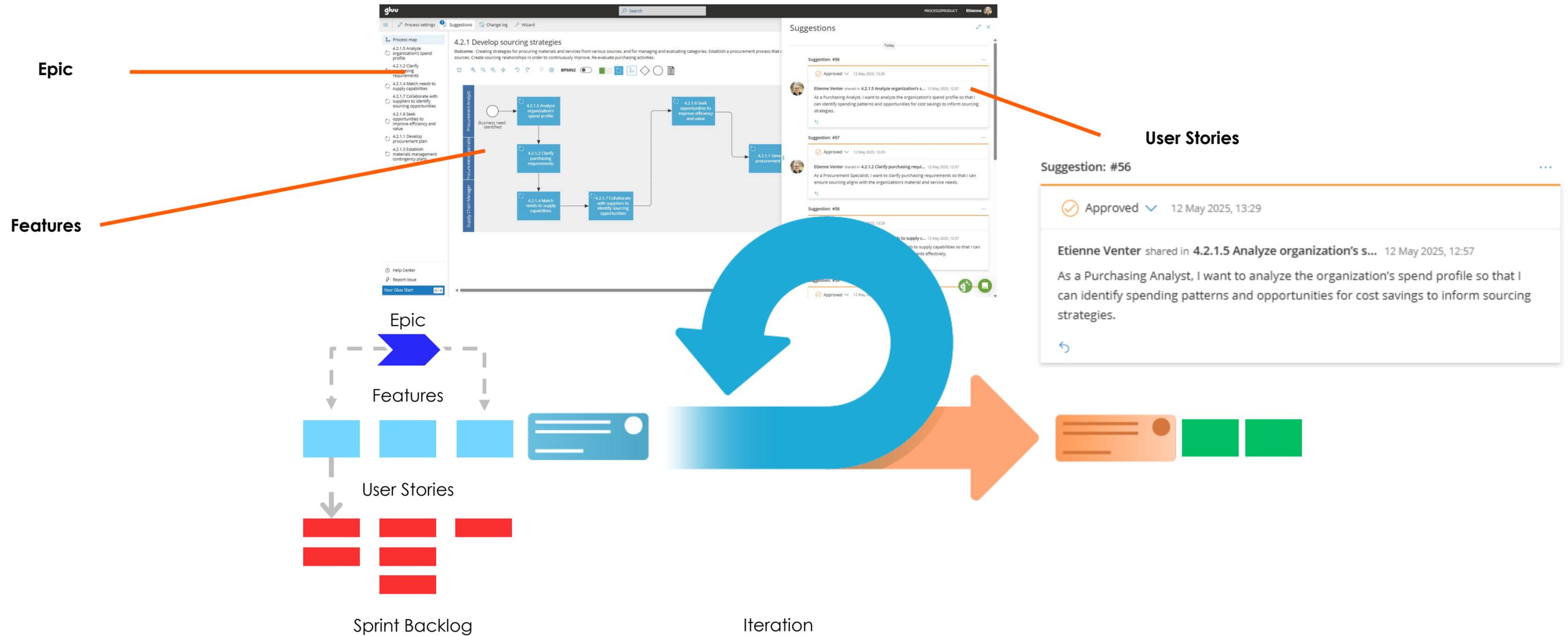


CONSTRUCTION



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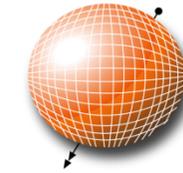
During the construction phase in Scrum, the team plans the sprint, holds daily scrums, designs and builds features, performs continuous testing, refines the backlog, reviews progress with stakeholders, and conducts retrospectives to improve.



PHASE 3: **TRANSITION**



TRANSITION



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|
 Process settings 7
Suggestions
Change log
Wizard

gluu
PROCESS2PRODUCT Etienne

Process settings
Suggestions
Change log
Wizard

Process map

- 4.2.1.5 Analyze organization's spend profile
- 4.2.1.2 Clarify purchasing requirements
- 4.2.1.4 Match needs to supply capabilities
- 4.2.1.7 Collaborate with suppliers to identify sourcing opportunities
- 4.2.1.6 Seek opportunities to improve efficiency and value
- 4.2.1.1 Develop procurement plan
- 4.2.1.3 Establish materials management contingency plans

4.2.1 Develop sourcing strategies

Outcome: Creating strategies for procuring materials and services from various sources, and for managing and evaluating categories. Establish a procurement process that sources. Create sourcing relationships in order to continuously improve. Re-evaluate purchasing activities.

Suggestions

Today

Suggestion: #56

Approved 12 May 2025, 13:29

Etienne Venter shared in 4.2.1.5 Analyze organization's s... 12 May 2025, 12:57

As a Purchasing Analyst, I want to analyze the organization's spend profile so that I can identify spending patterns and opportunities for cost savings to inform sourcing strategies.

Suggestion: #57

Approved 12 May 2025, 13:29

Etienne Venter shared in 4.2.1.2 Clarify purchasing requi... 12 May 2025, 12:57

As a Procurement Specialist, I want to clarify purchasing requirements so that I can ensure sourcing aligns with the organization's material and service needs.

Suggestion: #58

Approved 12 May 2025, 13:29

Etienne Venter shared in 4.2.1.4 Match needs to supply c... 12 May 2025, 12:57

As a Supply Chain Manager, I want to match needs to supply capabilities so that I can ensure suppliers can meet our purchasing requirements effectively.

Suggestion: #59

Approved 12 May 2025, 13:29

Run end-to-end testing for each process

Validate that each process is fully supported

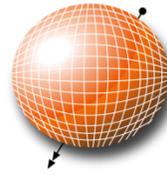
Train users by process and role



Product Increment



TRANSITION



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The screenshot shows the 'gluu' application interface. At the top, there's a search bar and user information for 'Etienne'. The main content area displays a document titled '3. Vendor Performance Evaluation' and '4. Best Practices for Spend Analysis'. The document includes navigation instructions, evaluation steps, and a note about regular evaluation. A video resource is embedded, titled 'Session 3 - Procurement And Sourcing Full Course (Microsoft Dynamics 365) RFQ Process steps'. The video content lists steps such as 'Create RFQ', 'Assign solicitation type', 'Add line items', 'Add the vendors', 'Send RFQ', 'Edit RFQ', 'Receive replies from vendors', 'Compare the replies', 'Accept the required RFQ', and 'Reject the remaining RFQ'. A table of contents sidebar on the right lists the document sections. The interface also includes a left-hand navigation menu with various options like 'New', 'Share', 'Info', 'PDF version', and 'Edit mode'.

Run end-to-end testing for each process

Validate that each process is fully supported

Train users by process and role

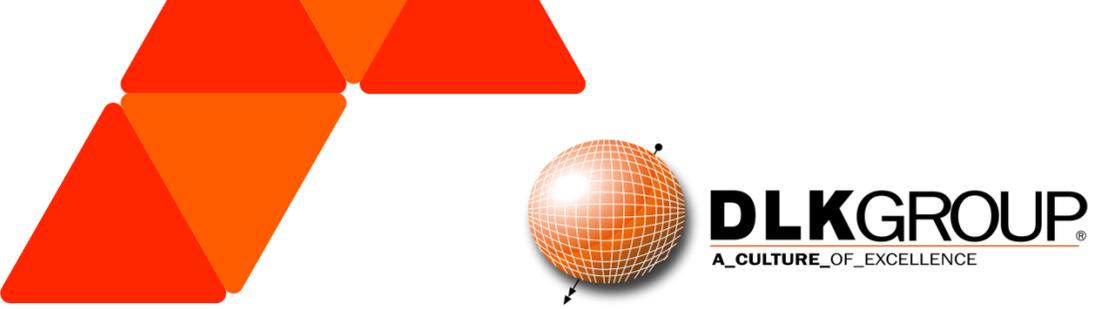


Product Increment

Work Instructions & Training Material Embedded in Process

PHASE 4: OPERATE

OPERATE



Initiate

Run cases or projects as repeatable process flows
Gluu lets you turn any process into a repeatable best practice flow.

Manage all scheduled tasks related with your processes
Gluu lets editors add recurring tasks to any activity in any process. This way tasks automatically show to people with the right roles.

Operate

- Ensure process adoption
- Monitor system health
- Collect process-specific metrics
- Refine processes and update stories for next cycles



Plan
Merchandise



Track Performance & Make Improvements

BENEFITS



Tangible benefits of adopting a process-first approach to solution delivery



Stronger Alignment Between Business and Delivery

By anchoring delivery backlogs to real-world business processes, teams ensure every feature directly supports how the business actually operates, closing the gap between strategy and execution.



End-to-End Validation of Business Value

UAT, training, and readiness checks validate not just features, but complete processes, ensuring the delivered solution works holistically from the user's perspective.



Improved Traceability and Governance

A process-first model makes it easier to trace features back to operational activities, aiding compliance, audits, and ongoing governance efforts.



Continuous Improvement Rooted in Real Use

By monitoring processes' performance post-transition, teams gather targeted feedback that directly informs enhancements, boosting long-term value.



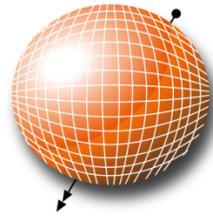
Clearer Backlog Structuring and Prioritization

Starting with high-priority processes as epics provides a natural hierarchy for the backlog, from processes → activities → features → user stories — improving focus and manageability in Agile or Scrum.



Stronger Engagement Across Teams

This approach bridges the gap between delivery teams and business stakeholders, fostering collaboration and shared ownership of outcomes from initiation to operations.



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