



CLM Health Check

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SERVICE

Get the project off on the right footing: A tailored, short duration study to validate current thinking and plan for successful delivery of the strategy.

Get an independent, expert answer to the critical questions, or validate ideas before investing in further, costly, research or technology in a particular area.



OUTPUTS & DOCUMENTATION

- ▶ Forensic analysis or validation of goals vs current state
- ▶ Scoping and Feasibility
- ▶ Current state and market awareness
- ▶ Governance and Communication
- ▶ Detailed Plans



USE CASES

Health-check is designed to answer a specific question or to shape a key strategic project:

- ▶ Validate what you think you know
- ▶ Identify and assess operational pain
- ▶ Understanding gaps and pitfalls
- ▶ Get everyone on the same page, speaking the same language
- ▶ Get a proven shape and structure for a new Reg-tech project
- ▶ Validate timeframes and delivery plans
- ▶ Checking that you have made the right technology decisions
- ▶ When you just need an expert opinion

Forensic Validation

- ▶ Detailed assessment of current state
- ▶ Validate known gaps and identify likely roadblocks
- ▶ Prove assumptions and business cases
- ▶ Test and inform strategy

Expert Planning

- ▶ Prioritise your focus on the most beneficial activities
- ▶ Avoid the common pitfalls
- ▶ Present detailed and attainable plans to stakeholders / board members
- ▶ Deliver in predictable timeframes



KEY FEATURES

Structured Transformation

- ▶ Define the problem and agree the strategy
- ▶ Implement a proven structured approach
- ▶ from the outset
- ▶ Get all stakeholders involved and talking to the same aims
- ▶ Define clear roles and governance to ensure seamless delivery
- ▶ Plan the communication and the people impact

The Delta Capita Difference / Domain Expertise:

Industry Know-how

- ▶ Understand current position vs the wider marketplace
- ▶ Build a real-world understanding of feasibility
- ▶ Avoid pitfalls with real-life transformation delivery
- ▶ Get an expert opinion on strategy



APPROACH

Rapid current state analysis including reviewing all or some of the following functional areas:

1. Structured coverage of key subject areas with workshops, shadowing and questionnaires (where applicable) to assimilate knowledge and gain understanding
2. Focused energy on the specific questions at hand, gathering the views of internal stakeholders and experts and adding in Delta Capita's experience to define an approach
3. or answer the critical questions
4. Review of project/programme structure and governance to ensure success
5. Regular check-ins with stakeholders on progress and direction to ensure that the direction of travel can be adapted to new information
6. Production of key deliverables to answer the questions posed
7. Minimise impact on key client Subject Matter Experts by keeping meetings targeted and spreading the impact over the study period

This approach can be tailored to the specific requirements of the problem statement, and is flexible to allow for extension and follow on activities.



TOOLS

Delta Capita has its own toolset for delivering outputs and managing the study. These include:

- ▶ Delta Capita Scoping Grid
- ▶ Health-check Scorecard
- ▶ Plans (Monday, MS project, Excel)
- ▶ Requirements capture (Mural, Flowcharts, Excel)
- ▶ Prestructured Powerpoint and
- ▶ Word documentation.
- ▶ Delta Capita's proven methodology

We will use the client's preferred tools wherever available or preferred.



STRUCTURE AND DURATION

- ▶ Typically around 2-4 weeks effort, with activity normally taking place over 1-2 months depending on complexity and availability of client resources
- ▶ Typically a team of 2 analysts supported by a manager and overseen by a Delta Capita Partner
- ▶ Team tailored to the knowledge and skillset requirement



SKILLS / KNOWLEDGE

- ▶ Project management / Planning
- ▶ Experience of variety of FS operating models
- ▶ CLM strategy and design