



How Business Transformations Experts Utilize the  
SoundStep Consulting Services'  
Business Operating Model Transformation Framework  
(BOMTF-13)

*Simplicity and Clarity*



# Overview

An ideal business would be one that is organized and structured only once as part of its initial launch, and does not need to be changed again. This ideal business will operate successfully regardless of market conditions, competition, changes in the economy, growth of its own workforce, changes in customer demand, or even when new products and services need to be launched. In fact, this ideal business would operate successfully with any new technology! And its leaders and employees would have no reason to make operating changes let alone undertake any major transformation. This ideal business would fit nicely into any fairy tale!

Unfortunately, an ideal business does not yet exist in our world and reality. Continuous change, and periodic transformations are required in some areas of the business, and sometimes across entire business. Changes and transformations are crucial for a business to continue to be successful. How much change or transformation to undertake is not an easy decision especially if a business that has been operating successfully for many years is suddenly faced with the prospect of losing market share because their customers are seeking products and services that are more relevant to their wants, needs, and lifestyles.

The bigger the change or transformation that a business undertakes, the bigger the requirements it will have for people, time, and money. The need to have a clear vision for the transformation, its scope, the desired outcomes and benefits, and resource requirements increases with the magnitude and complexity of the change. The transformation programs that companies are large scale, complex, involves significant organizational changes, leverages a wide array of digital platforms and technologies and can take 2 to 5 years to complete. They are challenging and high risk, however, for most companies they are critical to survival. The best choice is to excel at these transformation programs and not shy away from them.

This document explains how the SoundStep Consulting Services' Business Operating Model Transformation Framework (BOMTF-13) is used by today's transformation program experts to achieve repeatable success.



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# Introduction

The success of any transformation program (e.g. business operating model transformation, digital transformation and modernization, ecosystem expansion) is highly dependent on its definition and planning stage. The transformation programs that have succeeded all have one common attribute or factor - the executives, leaders, managers, associates, and the transformation program leaders and their teams invested the time, effort, and their creativity in ensuring that the following were clearly-defined, communicated to all stakeholders and formally agreed to:

- The Desired or Target Benefits in simple yet concrete terms
- What area(s) of the business will be changed or transformed
- How the area(s) of the business to be transformed currently operates
- What transformation levers will be used
- How the impacted business area(s) will be transformed so achieve the desired benefits
- What new capabilities will be created that will lead to achieving the desired benefits
- Classifying capabilities into two categories only, 1) Foundational, and 2) Differentiating
- How the transformation program's progress will be measured using the # of target benefits achieved and the new business capabilities delivered (and not by program activity outputs) in every phase, milestone, and upon full completion
- The rewards and recognition necessary to continuously motivate those who will carry out the transformation and those impacted by the transformation

This document describes how the **SoundStep Consulting Services' Business Operating Model Transformation Framework (BOMTF-13)** is used by transformation program experts as a method for gathering information, conducting focused ideation and innovation sessions, facilitating decision-making sessions on the items mentioned above, and for creating visual representations that summarize the most important aspects of a transformation program. The most successful transformation experts use the visual summaries to keep everyone involved in the program focused on the achieving the Target Benefits and New Business Capabilities - colloquially referred to as the **Prize!**



# Purpose and Guide

- This document was created for information sharing purposes
- It contains 10 examples of how the ***SoundStep Consulting Services' Business Operating Model Transformation Framework (BOMTF-13)*** was utilized by Transformation Experts from different companies and industries
- It assumes that the reader is familiar with the Framework and it's Thirteen (13) Dimensions (which is available in separate document)
- It also assumes that the reader is familiar with the Catalyst Questions that are part of the Framework and Methodology (which is also provided available as a separate document)
- Readers who become practitioners of the Framework are encouraged to share examples of how they have utilized it with ***SoundStep Consulting Services'***



# Figure 1: SoundStep Consulting Services' Business Operating Model Transformation Framework (BOMTF-13)<sup>1</sup> & Its Thirteen Dimensions

1. Corporate and Departmental Policies
2. Business Outcomes & Key Measures
3. Value Proposition in the Overall Value Chain
4. Internal and External Customers
5. Inherent Nature of Work
6. People Capabilities
7. Processes and Procedures Capabilities
8. Data, Analytics and Performance Tracking Capabilities
9. Internal and External Reports and Reporting
10. Regulatory, Audit, and Legal Compliance Capabilities
11. Document Management Capabilities
12. Platforms, Systems, Technology, and Information Security Capabilities
13. Location Capabilities and the Physical Locations Where Work is Conducted

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# Examples of How Today's Transformation Experts Use the SoundStep Consulting Services' Business Operating Model Transformation Framework (BOMTF-13)

1. Illustrate the Benefits the Executive Sponsor(s) Want Out of the Transformation
2. Collaborate on What Areas of the Company or Business Needs to be Transformed
3. Illustrate the Transformation Levers That Will be Applied
4. Illustrate Current and Future States
5. Illustrate Summarize Ideation Sessions
6. Show how the Vision Statement was Derived
7. Illustrate Organizations Required
8. Identify Sourcing Requirements
9. Finalize Vision Statement
10. Visually Summarize a Transformation Program for Inclusion in a Proposal/Business Case



# Example #1: How the Framework<sup>1</sup> Was Used to Summarize Initial Discussions with Executives Sponsors What They Want Out of the Business Model & Digital Transformations

## A Multinational Retail Company Summary of Desired Benefits

Use a Single Distributor in Europe and the U.K. (Target: 25% Cost Reduction)

25% Increase Market Share in Latin America

15% Increase in Speed to Market for Products Sold to Small Businesses in U.S. & Canada

Increase Conversions via Dynamic Pricing & Digital Marketing Campaigns

1. Corporate and Departmental Policies
2. Business Outcomes & Key Measures
3. Value Proposition in the Overall Value Chain
4. Internal and External Customers
5. Inherent Nature of Work
6. People Capabilities
7. Processes and Procedures Capabilities
8. Data, Analytics and Performance Tracking Capabilities
9. Internal and External Reports and Reporting
10. Regulatory, Audit, and Legal Compliance Capabilities
11. Document Management Capabilities
12. Platforms, Systems, Technology, and Information Security Capabilities
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Exit from Eastern Europe

30% Productivity Increase from Operations

Fully Automated Order Entry Processes

Migrate IT Infrastructure Services and Infrastructure Assets to 3rd Party Cloud Provider (Opex & CapEx Reductions - \$XX MM & \$ XX MM)

Create Two New Regional Processing Centers in Latin America

Note:

1- Framework refers to the SoundStep Consulting Services' Business Operating Model Transformation Framework (BOMTF-13)



# Example #2: How the Framework<sup>1</sup> Was Used to Collaborate on What Areas of the Company Needs to be Transformed

## A Multinational Retail Company Summary of Desired Benefits

Use a Single Distributor in Europe and the U.K. (Target: 25% Cost Reduction)

25% Increase Market Share in Latin America

Research & Development, Product Management, Quality Assurance,

Marketing Organization

1. Corporate and Departmental Policies
2. Business Outcomes & Key Measures
3. Value Proposition in the Overall Value Chain
4. Internal and External Customers
5. Inherent Nature of Work
6. People Capabilities
7. Processes and Procedures Capabilities
8. Data, Analytics and Performance Tracking Capabilities
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Exit from Europe

30% Productivity Increase from Operations

Fully Automated Order Entry Processes

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Create Two New Regional Processing Centers in Latin America

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# Example #3: How the Framework<sup>1</sup> Was Used to Illustrate the Transformation Levers That Will be Applied

## A Tier 1 Insurance Company Summary of the Eleven (11) Transformation Levers



### Transformation Levers

1. Exit Florida and California Markets
2. Sell Off L&A Line of Business
3. Shift Sales Support Teams in Home Office to Regional Office
4. Implement Machine Learning & RPA in Underwriting PProcesses
5. Training for P&C Workforce on New Processing Platform
6. Shift to Cloud-based Data Management & Analytics in Actuarial Services
7. Transfer L&A Workforce to Acquiring Company
8. Acquire 3rd Part Policy Administration & Claims PProcessing Platform
9. Consolidate Billing and Accounting Functions
10. Decommission 5 Legacy Policy Admin Systems
11. Close Offices in FL and CA

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# Example #4: How the Framework<sup>1</sup> Was Used to Illustrate Current and Future States

## A Multinational Consumer Electronics Company

### Current State

1. Corporate and Departmental Policies Co-located Local Sales & Sales Support (Total 137 Offices); Internal Sales Team in MEA
2. Business Outcomes & Key Measures Sales Support (Headcount = XXX, Cost = \$XXMM)
3. Value Proposition in the Overall Value Chain Out of Scope
4. Internal and External Customers Dedicated Sales Support for Each Sales Office
5. Inherent Nature of Work Sales Support Considered Front Office Function
6. People Capabilities Skilled in local Sales Support processes, systems, and tools
7. Processes and Procedures Capabilities Sales Support Standard Operating Procedures (90% Manual)
8. Data, Analytics & Performance Tracking Capabilities Varying Local Sales Support Data Analytics & Tools
9. Internal and External Reports and Reporting Out of Scope
10. Regulatory, Audit, and Legal Compliance Capabilities Out of Scope
11. Document Management Capabilities Out of Scope
12. Technologies Capabilities (Systems, Infrastructure Services, etc.) Legacy Sales Support Data Analytics Systems & Tools
13. Location Capabilities and the Physical Locations 137 Local Sales & Sales Support Offices

### Future State

1. Corporate and Departmental Policies Sales Support Located in 4 Regional Offices; 3rd Party Distributor (no Internal Sales Team( in MEA)
2. Business Outcomes & Key Measures Sales Support (Prod. Target +30%Headcount = XXX, Cost = \$XXMM)
3. Value Proposition in the Overall Value Chain Out of Scope
4. Internal and External Customers Regional Sales Support Team support Sales Teams in region
5. Inherent Nature of Work Sales Support Considered Mid-Office Function
6. People Capabilities Train Sales Support Teams on new CRM system & analytical tools
7. Processes and Procedures Capabilities Automate Sales Support Procedures 90 - 100%
8. Data, Analytics & Performance Tracking Capabilities Single CRM System & Tools with Local Customizations)
9. Internal and External Reports and Reporting Out of Scope
10. Regulatory, Audit, and Legal Compliance Capabilities Out of Scope
11. Document Management Capabilities Out of Scope
12. Technologies Capabilities (Systems, Infrastructure Services, etc.) Single CRM System & Tools, and Virtual Collaboration Technology
13. Location Capabilities and the Physical Locations 4 Regional Offices; 80 Sales Offices

Note:

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SoundStep Consulting Services

# Example #5: How the Framework<sup>1</sup> was Used to Illustrate Summarize Ideation Sessions

## A Multinational Consumer Electronics Company

### Current State

1. Corporate and Departmental Policies Co-located Local Sales & Sales Support (Total 137 Offices); Internal Sales Team in MEA
2. Business Outcomes & Key Measures Sales Support (Headcount = XXX, Cost = \$XXMM)
3. Value Proposition in the Overall Value Chain Out of Scope
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12. Technologies Capabilities (Systems, Infrastructure Services, etc.) Legacy Sales Support Data Analytics Systems & Tools
13. Location Capabilities and the Physical Locations 137 Local Sales & Sales Support Offices

### Transformation Levers

- Establish Four Regional Offices
- 3rd Party Distributor in MEA
- Regionalization of Sales Support Function & Teams
- Single CRM System & Tools with Local Customizations; Virtual Collaboration Tools
- Consolidation of 137 Sales & Support Offices to 80

Note:

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### Future State

1. Corporate and Departmental Policies Sales Support Located in 4 Regional Offices; 3rd Party Distributor (no Internal Sales Team( in MEA)
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# Example #6: How the Framework<sup>1</sup> Was Used to Derive the Vision Statement

## A Multinational Consumer Electronics Company



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### Global Sales Support Transformation Vision Statement

Sales Support Services Will Achieve +30 Productivity Gains, \$XXXXXX Cost Savings, XX% Margin Increase By

- Upskilling of Sales Support Teams
- Re-Deployment of Sales & Sales Support Teams in MEA
- Automation of Processes via Single Company-Wide CRM System
- Common Set of Data Analytics Tools
- Virtual Collaboration Capabilities in All Locations
- Establishing Four Regional Offices
- By XXXX (year)



# Example #7: How the Framework<sup>1</sup> Was Used to Illustrate Organizations Required

## A Multinational Consumer Electronics Company

### Current State

1. Corporate and Departmental Policies Co-located Local Sales & Sales Support (Total 137 Offices); Internal Sales Team in MEA
2. Business Outcomes & Key Measures Sales Support (Headcount = XXX, Cost = \$XXMM)
3. Value Proposition in the Overall Value Chain Out of Scope
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10. Regulatory, Audit, and Legal Compliance Capabilities Out of Scope
11. Document Management Capabilities Out of Scope
12. Technologies Capabilities (Systems, Infrastructure Services, etc.) Legacy Sales Support Data Analytics Systems & Tools
13. Location Capabilities and the Physical Locations 137 Local Sales & Sales Support Offices

### Organizations Involved in Transformation Program

- Sales and Sales Support (All Locations); MIS Teams
- Information Technology & Infrastructure
- Facilities
- Strategic Partners & Vendor Management Unit
- Human Resources
- Organizational Change Management Teams
- Workers' Councils
- Support from Legal, Audit, Finance & Accounting

### Future State

1. Corporate and Departmental Policies Sales Support Located in 4 Regional Offices; 3rd Party Distributor (no Internal Sales Team( in MEA)
2. Business Outcomes & Key Measures Sales Support (Prod. Target +30%Headcount = XXX, Cost = \$XXMM)
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# Example #8: How the Framework<sup>1</sup> Was Used to Identify Sourcing Requirements

## A Multinational Consumer Electronics Company

### Current State

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Co-located Local Sales & Sales Support (Total 137 Offices);  
Internal Sales Team in MEA
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Sales Support (Headcount = XXX, Cost = \$XXMM)
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Skilled in local Sales Support processes, systems, and tools
7. Processes and Procedures Capabilities  
Sales Support Standard Operating Procedures (90% Manual)
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Varying Local Sales Support Data Analytics & Tools
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Legacy Sales Support Data Analytics Systems & Tools
13. Location Capabilities and the Physical Locations  
137 Local Sales & Sales Support Offices

### Transformation Levers

- Establish Four Regional Offices
- 3rd Party Distributor in MEA
- Regionalization of Sales Support Function & Teams
- Single CRM System & Tools with Local Customizations; Virtual Collaboration Tools
- Consolidation of 137 Sales & Support Offices to 80

### Sourcing Requirements

#### Internal

- Strategic Partners & Vendor Management Unit
- Facilities
- Infrastructure Services (IS)
- Sales and Sales Support (All Locations); MIS Teams
- Human Resources
- Organizational Change Management (OCM) Teams
- Workers' Councils
- Information Technology & IS
- Strategic Partners & Vendor Management Unit
- Facilities
- Infrastructure Services (IS)
- Support from Legal, Audit, Finance & Accounting

#### 3rd Party

- Construction Company (XXXX)
- MEA Distributor (AAAAA)
- Business Process Consultants Company (XXXXX)
- OCM Consultants (Company XXXX)
- CRM Vendor
- Virtual Collaboration Tools Vendor
- Construction Company (XXXX)
- Regional & Local Telco & Networking Companies
- Moving Company (XXXXX)

TRANSFORMATION

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# Example #9: How the Framework<sup>1</sup> Was Used to Finalize the Transformation Vision

## A Multinational Consumer Electronics Company

### Current State

1. Corporate and Departmental Policies Co-located Local Sales & Sales Support (Total 137 Offices); Internal Sales Team in MEA
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4. Internal and External Customers Dedicated Sales Support for Each Sales Office
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### Global Sales Support Transformation Vision Statement

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Margin Increase By

- Upskilling of Sales Support Teams
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- Automation of Processes via Single Company-Wide CRM System
- Common Set of Data Analytics Tools
- Virtual Collaboration Capabilities in All Locations
- Establishing Four Regional Offices
- By XXXX (year)

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# Example #10 : How the the Framework<sup>1</sup> Was Used to Create a Visual Summary of a Transformation Program for Inclusion in a Business Case Proposal

## A Multinational Bank Transformation Proposal Summary

Transformation Levers		Impacted Business Areas	Benefits (\$) and Costs
		A	
A.	Corporate Policy Change	A,B,C	
B.	New Outcomes and Measures	A,C,D	
C.	Shift in Value Proposition (e.g. new products)	A,C	
D.	Transformation of the nature of work	D,J	
E.	Transform People Capabilities & Org Structure	A,E,F,H,I,J	
F.	Process Elimination	A,F,G,H,I,J	
G.	Process Reimagination/Automation		
H.	Data, and Analytics Consolidation/Elimination of redundant data		
I.	Templates, Forms, and Reporting Consolidation		
J.	Digital Technologies (cloud, mobility, AI, RPA)		
		1. Corporate and Departmental Policies	\$xxxx and \$xxxx
		2. Business Outcomes & Key Measures	\$xxxx and \$xxxx
		3. Value Proposition in the Overall Value Chain	\$xxxx and \$xxxx
		4. Internal and External Customers	\$xxxx and \$xxxx
		5. Inherent Nature of Work	\$xxxx and \$xxxx
		6. People Capabilities	\$xxxx and \$xxxx
		7. Processes and Procedures Capabilities	\$xxxx and \$xxxx
		8. Data, Analytics and Performance Tracking Capabilities	\$xxxx and \$xxxx
		9. Internal and External Reports and Reporting	\$xxxx and \$xxxx
		10. Regulatory, Audit, and Legal Compliance Capabilities	\$xxxx and \$xxxx
		11. Document Management Capabilities	\$xxxx and \$xxxx
		12. Platforms, Systems, Technology, and Information Security Capabilities	\$xxxx and \$xxxx
		13. Location Capabilities and the Physical Locations Where Work is Conducted	\$xxxx and \$xxxx
			Totals = \$xxxx and \$xxxx

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# Thank You!

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