

Finance Operations Assistance



8/16/2024 | Great Lakes Water Authority

Understanding of Business Need:

Great Lakes Water Authority (GLWA) is in the midst of deploying a new EAM system and is planning for a new PMIS system after having just completed an ERP implementation within their organization. Currently, GLWA's resources are constrained, particularly in the Financial Services Area, and they require support. The aim is to provide assistance in navigating and documenting the inter-group impacts to prevent silos and unintended consequences in other departments, ensuring that the finance teams' requirements are met without disrupting other areas. Additionally, GLWA needs to align with the newly implemented Adaptive system. This initiative will enhance the team's ability to communicate its value to stakeholders and interact more effectively with business partners. We suggest a proactive approach to collaborate with the Finance teams to manage their workload and anticipate future demands. Our assistance will focus on providing both technical and organizational expertise in the execution of GLWA's goals.



HOW

Slalom proposes an execution team with Chief of Staff and Business Analyst skillsets to collaborate with key stakeholders to understand and leverage their skills to offset the limited resource capacity. The emphasis will be on aligning technical needs and requirements with the specific needs of the Financial Services area. By implementing the CFO's strategic vision, the team will guide best practices, offer dedicated support to safeguard the interests of the financial teams, and foster consensus and alignment with those objectives; it will also drive consistent and coordinated delivery with the ability to adapt as needed - both for project goals and for holistic support of GLWA teams.

WHAT

- Champion and socialize as necessary for the teams, acting as a liaison to translate technical needs and ensure that requirements reflect the unique needs of the Financial Services Team
- Implement the CFO's strategic vision by guiding best practices, providing dedicated support to protect financial team interests, and building consensus and alignment to support those goals
- Seek to elevate continuous improvement opportunities; identify communication and change management opportunities
- Provide high-level insight into how people are impacted by the change, with relation to the processes being documented

OUTCOME

- Improved knowledge transfer for new hires
- Single source of truth to ensure internal alignment
- Improve ability to support people through change
- Consistent and coordinated delivery, with the flexibility to adjust as necessary to meet project objectives and provide comprehensive support to GLWA teams

Slalom Chief of Staff	Slalom Business Analyst	Program Management Connect
<ul style="list-style-type: none"> • Assist with increasing collaboration and trust amongst team members and alignment to a common vision • Coordinate staff meetings and follow up (e.g. agenda, action owners, due dates, impacts of non action) • Align with Client leadership on expected engagement outcomes • Analyze, plan and execute key people-related initiatives, as needed • Serve as sounding board to the Financial Directors – communicating relevant ideas, opportunities and concerns to the leadership team • Stakeholder engagement and communication • Develop and manage executive and organizational-level communications • Promote ongoing alignment across stakeholder groups • Assist with strategic planning to promote alignment of priorities, initiatives, and spend to vision and strategic direction • Prepare and follow up on critical strategic planning sessions • Assist with documenting and aligning strategic objectives to value streams, capabilities or processes 	<ul style="list-style-type: none"> • Work closely with both parties to understand and manage the software development and implementation process. • Communicate risks to key stakeholders, and assist the GLWA team with project management tasks, including training and documentation • Use tracking tools to monitor project progress, identify dependencies, and ensure timely execution • Write and document detailed software requirements to align with client needs and project goals • Represent and facilitate the financial team's interests, ensuring their needs are addressed throughout the project 	<ul style="list-style-type: none"> • Ensure tie-in to ongoing IT activities to avoid silos between Finance and IT • Provide support and best practice guidance to the team • With program office, coordinate portfolio planning within FINs and across other stakeholder groups • Assist and advise on special projects (e.g., work scoping, schedule creation / management, reporting, execution leadership), as needed

ASSUMPTIONS

- Slalom will have access to all needed systems, buildings and networks
- Client resources and subject matter experts will be available as needed
- Activities are based on current high priorities (as identified by GLWA) and are subject to change

SLALOM TEAM

- Engagement Leadership - Jessica Dilworth (PT)
- Chief of Staff - (FT)
- Business Analyst - (FT)

INVESTMENT

- Time & Materials based on proposed rates (shown on page 2)



Katie Schulz
Director

(248) 613-1715
Katie.Schulz@slalom.com

Finance Operations Assistance



8/16/2024 | Great Lakes Water Authority

Proposed Rate Structure based on Preliminary Scope Discussion:

2024 - August - December

Role	Hourly Rate	Weekly Hours	Total Hours	Total
Engagement Leadership	\$0	4	68	\$0
Program Management Connect (J. Dilworth)	\$284	5	85	\$24,140
Chief of Staff (M. Peurach)	\$228	40	656	\$149,568
Business Analyst	\$216	40	656	\$141,696
				\$315,404

2025* - January - August

Role	Hourly Rate	Weekly Hours	Total Hours	Total
Engagement Leadership	\$0	4	136	\$0
Program Management Connect (J. Dilworth)	\$293	5	170	\$49,810
Chief of Staff (M. Peurach)	\$235	40	1360	\$319,600
Business Analyst	\$222	40	1360	\$301,920
	3% increase			\$671,330

Total Estimated Cost:
\$986,734

*Consistent with rates from Oct. 2022 engagement



RELEVANT EXPERIENCE

Portfolio Manager

Managed multiple portfolios within various industries to meet organizational goals and objectives. Worked with Stakeholders to enable decision-making, provide visibility, align across executive management, prioritize, monitor, and track within each portfolio while maximizing the value created by implementing and managing an optimal mix of investments that balance risk and return.

Project Manager

Managed multiple projects within countless industries. Focused on planning and leading execution of all aspects of each project including scheduling, resources, scope, budget, risks/issues, and communication and change management.

Program Manager

Led one or more programs within multiple organizations across a multitude of industries. Managed escalations such as risks, issues and decisions. Planned, budgeted, oversaw program activities, and documented all aspects of the programs. Including ensuring the projects within the program align and benefit the overall business/strategic goals, while providing guidance and leadership to the project managers/work stream leads and stakeholders.

Implementation Project Manager

Managed Enterprise Resource Planning (ERP) & Electronic Health Record (EHR) system implementations utilizing industry best practices and a mix of waterfall and agile project management methodologies across many industries.

SKILLS

- Risk, Resource, Requirements, Scope and Stakeholder Management
- Lean Portfolio Management
- Speaking and Workshops
- Business Case Development
- Process Measurement & Management
- Negotiation & Contract Management
- Monitoring & Coordination
- Communication & Conflict Management

INDUSTRIES

- Utilities
- Manufacturing
- Public and Social Impact
- Life Sciences
- Resources
- Retail and Consumer Goods
- Financial Services

CERTIFICATIONS

- SAFe Certified Agilist (SA)
- SAFe LPM
- PMP
- PSM I



Jessica Dilworth

Senior Consultant Delivery Leadership

Jessica is a senior consultant with Slalom's Delivery Leadership focused on Project, Program, Portfolio management, and team coaching. She specializes in leading project teams in optimizing processes and ensuring projects are executed efficiently and on time. As a talented communicator and presenter, Jessica has a demonstrated history of fostering a collaborative and safe environment for high-performing teams, identifying process inefficiencies and driving continuous improvement, and building trust and engagement through various groups and levels of an organization.



Megan Peurach

Consultant, Solution Owner Delivery Leadership

Megan is a Solution Owner with Slalom's Detroit Delivery Leadership practice. She is experienced in Business Analysis, Agile Coaching, and Product Management. She has a Scrum Master certification (CSM) that enables her to be more effective in agile delivery.

Megan wears many hats and does what's needed to get a product across the finish line while putting an emphasis on client satisfaction. She is always eager to work in new areas and expand her skillset.

RELEVANT EXPERIENCE

Solution Owner, Workday Implementation

Provided support and facilitation during Workday implementation, focusing on Financial Accounting and Reporting teams under the oversight of the financial Director. Duties included coordination of internal and contractor teams, development of business processes and training, as well as reporting and data validation efforts. Prepared and maintained robust communications on status, progress, and risks at the executive level to the CFO.

Solution Owner/Business Analyst, Storm Digitization and Automation

Co-owned the backlog for any given initiative, ensuring the stories were ready for planning. Lead agile ceremonies; backlog refinement, sprint retrospective, and daily stand ups. Facilitator and coordinator of team meetings. Supported analysis of current state processes, experiences and data to lead the team in a solution for future state development. Synthesize current state inputs into weekly summary findings for both the client and development team.

Business Analyst, ApexHealth

Assisted in understanding business needs, managed backlog items and as one of the solution owners with agile pod delivery that enabled the client to integrate their data with several healthcare vendors and rearchitecting their data warehouse structure.

Business Analyst/Product Owner, Document Management System

Single handedly managed the application development teams backlog, ran all agile ceremonies, and worked with the Product manager to determine the priority. Worked closely with stakeholders to obtain feedback and align on priorities. Was an advocator for team health and collaboration.

SKILLS

- Agile Methodologies
- Scrum
- Business Analysis
- Team Building
- Release Management
- Backlog Management
- Communication

INDUSTRIES

- Utilities
- Health
- Mortgage

CERTIFICATIONS

- Scrum Master Certification (CSM)



Caitlin Orlando

Consultant Delivery Leadership

Caitlin Orlando is a Solution Owner within Slalom's Detroit Delivery Leadership practice. She has experience working on agile delivery teams with varying roles; business analyst, project management, scrum master, and agile coach. She has also served as team leader with the primary goal of building teams skill sets. Caitlin has a passion for collaboration and team health (at the team and team member level) with a focus on clear communication, quality and doing what is best for her client.

RELEVANT EXPERIENCE

Utilities Distribution Operation IT Delivery Lead/Project Manager

Managed and drove delivery of projects and business cases. I led business analysts in development of project requirements, advocating for client needs/desires both with vendors and internal teams and building a strong relations between the business and IT. In addition, I would drive client vision with the project team by creating and maintaining project timelines, team backlogs and facilitated project ceremonies through the delivery lifecycle to mitigate risk and promote healthy progress.

API product group: Scrum Master, Business Analyst, and Agile Coach

Established an agile way of working for a backend API development group, comprised of Slalom and Client team members. I worked with the team to improve their ways of working as a unit to increase team velocity, streamline communication, and improve the over all team relationship. I was able assist them in building and organizing a project backlog with achievable milestones and lead the team through feature delivery while coaching members through best practices and any roadblocks they experienced.

Automotive EV Fleet Data-Visualization : Business Analyst/Scrum Master -

Managed a data-visualization team comprised of both client and Slalom team members. The goal was to increase team velocity and mend the client relationship. This was accomplished through organizing the existing backlog, coaching the team through efficient agile ways of working, and creating a team communication contract. Worked very closely with the product owners and product manager to ensure that team growth and project work was becoming more stable and on track for agreed upon deadlines; all while protecting the team's work/life balance.

Automotive Web App: Solution Owner, Scrum Master, Business Analyst, Manual QA

Managed a web-based delivery team as a scrum master, business analyst, QA and project manager. This team's work stretched across multiple business paths, which required managing/forecasting project roadmaps between multiple client product owners to ensure priority and scope are consistently aligned.

Marketing: Business Analyst/Project Manager

Worked with primary business partners, outside business partners, vendors, and enterprise security teams to maintain and enhance company websites and custom marketing suite. Ran scrum ceremonies, scrum of scrums, and executive summary readouts. Worked closely with technical writers and training teams to create and facilitate training required for product releases and site enhancements. Collaborated with application monitoring teams to performance/load test and monitoring site up-time during Super Bowl events.

SKILLS

- Agile Methodologies
- Solution Owner
- Business and Technical Requirements
- User experience mapping
- Backlog Management
- Scrum facilitation
- Agile Coaching
- Product Forecasting
- User analytics
- Technical Delivery
- Team Building

INDUSTRIES

- Financial Services
- Marketing
- Technology
- Automotive
- Utilities