

# Logical Proposed Programs — Portfolio Overview

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## New Product Rollout

- Increase the percentage of product, funnel, onboarding, billing, and service performance data available within one business day from 40% to 95%.
- Create a low-friction digital buying and onboarding experience.
- Operate the new product portfolio predictably and economically.

## Core Efficiency

- Simplify the flow of opportunities through partners and sales.
- Improve the reliability and efficiency of the technology estate.
- Reduce financial and data-related operational friction.

## AI Enablement

- Use AI to improve customer and market decision-making.
- Create faster, more relevant customer interactions.
- Build responsible, repeatable AI adoption across the workforce.

## Reduce Customer Churn

- Improve retention and deepen customer loyalty.
- Identify and address customer risk before it results in churn.
- Help customers obtain value with less effort.

## Trustworthy operations

- Make compliance and internal controls consistently effective.
- Protect employees, information, and company operations.
- Embed architecture and data governance into business change.
- Take each division through Sarbanes Oxley compliance

# New Product Rollout

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## Objective 1

Increase the percentage of product, funnel, onboarding, billing, and service performance data available within one business day from 40% to 95%.

- Increase the percentage of new-logo revenue generated by the new product portfolio from 0% to 15%.
- Acquire 500 new customers in the target small-company segment.
- Achieve an online visitor-to-purchase conversion rate of at least 3.5%.
- Achieve a customer acquisition payback period of 12 months or less for the new customer segment.

## Objective 3

Operate the new product portfolio predictably and economically.

- Achieve quarterly demand forecast accuracy within 10% for the new customer segment.
- Reduce the service delivery cost per new-segment customer by 20% after the first two quarters.
- Increase the percentage of eligible service incidents resolved remotely without a field visit from 45% to 75%.
- Increase the percentage of product, funnel, onboarding, billing, and service performance data available within one business day from 40% to 95%.

## Capability Areas

2.0 Market Management • 3.0 Sales Strategy & Planning • 4.0 Sales Execution • 5.0 Campaign Management • 8.0 Sales Negotiation • 9.0 Product Management • 11.0 Order Management • 12.0 Customer Success • 13.0 Data Management & Analytics

## Objective 2

Create a low-friction digital buying and onboarding experience.

- Increase the percentage of purchases completed using standard pricing and contracts without employee intervention from 10% to 80%.
- Reduce the median time from purchase to first customer value from 12 business days to 2 business days.
- Increase the percentage of customers completing onboarding within the expected timeframe from 55% to 90%.
- Reduce the percentage of orders requiring billing or contract correction after submission from 9% to less than 2%.

# New Product Rollout — Capability Areas In Scope

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## 2.0 Market Management

### 2.3 Market Forecasting

- Market Forecasting — Tools
- Market Forecasting — Information
- Market Forecasting — Process
- Market Forecasting — People

## 3.0 Sales Strategy & Planning

### 3.5 Sales Contract Management

- Sales Contract Management — Tools
- Sales Contract Management — Information

### 3.6 Sales Training & Enablement

- Sales Training & Enablement — Tools
- Sales Training & Enablement — Information

## 4.0 Sales Execution

### 4.1 Sales Lead Qualification

- Sales Lead Qualification — Tools
- Sales Lead Qualification — Process
- Sales Lead Qualification — Information

## 5.0 Campaign Management

### 5.4 Campaign Performance Management

- Campaign Performance Management — Tools
- Campaign Performance Management — Information

## 8.0 Sales Negotiation

### 8.4 Contract and Signature Management

- Contract and Signature Management — Process
- Contract and Signature Management — Information

## 9.0 Product Management

### 9.3 Product Ideation & Innovation

- Product Ideation & Innovation — Tools
- Product Ideation & Innovation — Information
- Product Ideation & Innovation — Process
- Product Ideation & Innovation — People

### 9.7 Product Pricing

- Product Pricing — Tools
- Product Pricing — Information

## 11.0 Order Management

### 11.1 Order Creation and Identification

- Order Creation and Identification — Process
- Order Creation and Identification — Tools
- Order Creation and Identification — Information

### 11.2 Product Configuration for Order

- Product Configuration for Order — Tools
- Product Configuration for Order — Information

### 11.3 Order Placement & Cancellation

- Order Placement & Cancellation — Process

### 11.5 Customer Billing and Cash Application

- Customer Billing and Cash Application — Tools
- Customer Billing and Cash Application — Information

### 11.6 Credit and Collections

- Credit and Collections — Tools
- Credit and Collections — Information

## 12.0 Customer Success

### 12.1 Customer Onboarding

- Customer Onboarding — Process
- Customer Onboarding — Tools
- Customer Onboarding — Information

### 12.3 Field Service and Remote Support

- Field Service and Remote Support — Tools
- Field Service and Remote Support — Information

## 13.0 Data Management & Analytics

### 13.4 Advanced Analytics & Data Science

- Advanced Analytics & Data Science — Tools
- Advanced Analytics & Data Science — Information
- Advanced Analytics & Data Science — Process
- Advanced Analytics & Data Science — People

# AI Enablement

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## Objective 1

Use AI to improve customer and market decision-making.

- Increase qualified-account conversion through AI-assisted account targeting from 8% to 11%.
- Reduce the time required to produce recurring market and customer analyses from 10 business days to 3 business days.
- Increase the percentage of priority campaigns using governed predictive or generative insights from 5% to 60%.
- Demonstrate an improvement of at least 10% against a non-AI comparison group for each production analytics use case.

## Objective 3

Build responsible, repeatable AI adoption across the workforce.

- Increase the percentage of employees in designated AI-enabled roles who complete training on approved tools and responsible-use practices from 5% to 90%.
- Achieve monthly active use of approved AI tools among at least 65% of employees in targeted roles.
- Increase the percentage of production AI use cases with completed risk, privacy, security, and human-oversight assessments from 20% to 100%.
- Reduce the recruiting cycle time for targeted positions from 48 days to 35 days through approved AI-supported workflows.

## Objective 2

Create faster, more relevant customer interactions.

- Increase the percentage of eligible digital and service interactions supported by AI assistance from 0% to 40%.
- Reduce the average response time across supported customer channels from 11 hours to 4 hours.
- Increase conversion from customer events and digital engagement from 6% to 8%.
- Reduce the production cycle for approved public-relations and digital content from 8 business days to 3 business days.
- Maintain or improve customer satisfaction and brand-compliance rates while introducing AI-assisted interactions and content.

## Capability Areas

1.0 Brand Management • 3.0 Sales Strategy & Planning • 6.0 Marketing Event Management • 7.0 Customer Management • 13.0 Data Management & Analytics • 17.0 Corporate Management • 18.0 Human Resources

# AI Enablement — Capability Areas In Scope

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## 1.0 Brand Management

### 1.8 Digital Presence / SEO / AIO

- Digital Presence / SEO / AIO — Information
- Digital Presence / SEO / AIO — Tools

## 3.0 Sales Strategy & Planning

### 3.2 Account Targeting & Prioritization

- Account Targeting & Prioritization — Process
- Account Targeting & Prioritization — Tools
- Account Targeting & Prioritization — Information

## 6.0 Marketing Event Management

### 6.2 Event Targeting

- Event Targeting — Information
- Event Targeting — Tools
- Event Targeting — Process

## 7.0 Customer Management

### 7.6 Omnichannel Interaction Management

- Omnichannel Interaction Management — Tools
- Omnichannel Interaction Management — Information
- Omnichannel Interaction Management — Process

## 13.0 Data Management & Analytics

### 13.8 Customer & Market Analytics

- Customer & Market Analytics — Information
- Customer & Market Analytics — Process
- Customer & Market Analytics — Tools

## 17.0 Corporate Management

### 17.7 Public Relations

- Public Relations — Information
- Public Relations — Process
- Public Relations — Tools

## 18.0 Human Resources

### 18.1 Recruiting

- Recruiting — Process
- Recruiting — Tools
- Recruiting — Information

# Reduce Customer Churn

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## Objective 1

Improve retention and deepen customer loyalty.

- Increase gross revenue retention from 89% to 94%.
- Increase net revenue retention from 101% to 108%.
- Reduce annual customer-logo churn from 12% to 8%.
- Increase the percentage of customers indicating an intent to renew from 72% to 85%.

## Objective 3

Help customers obtain value with less effort.

- Increase the percentage of eligible account-management transactions completed through self-service from 25% to 70%.
- Increase the percentage of active users completing role-appropriate customer training from 35% to 75%.
- Reduce the median time required to resolve critical customer escalations from 72 hours to 24 hours.
- Increase customer satisfaction following an escalation from 68% to 85%.

## Capability Areas

1.0 Brand Management • 4.0 Sales Execution • 7.0 Customer Management • 12.0 Customer Success • 15.0 IT Infrastructure & Support

## Objective 2

Identify and address customer risk before it results in churn.

- Increase the percentage of active customers with a current health score from 45% to 95%.
- Increase the percentage of customers that are identified as being at risk at least 60 days before they churn from 25% to 70%.
- Increase the percentage of high-risk accounts receiving an approved intervention plan within five business days from 30% to 90%.
- Increase the percentage of customers retained after receiving a formal churn-prevention intervention from 15% to 40%.

# Reduce Customer Churn — Capability Areas In Scope

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## 1.0 Brand Management

### 1.4 Brand Loyalty Management

- Brand Loyalty Management — Information
- Brand Loyalty Management — Tools
- Brand Loyalty Management — Process
- Brand Loyalty Management — People

## 4.0 Sales Execution

### 4.3 Customer Needs Collection

- Customer Needs Collection — Process
- Customer Needs Collection — Information

## 7.0 Customer Management

### 7.2 Customer Preference Management

- Customer Preference Management — Process
- Customer Preference Management — Tools
- Customer Preference Management — Information

### 7.8 Customer Information Management

- Customer Information Management — Information
- Customer Information Management — Tools
- Customer Information Management — Process

## 12.0 Customer Success

### 12.1 Customer Onboarding

- Customer Onboarding — People

### 12.5 Self-Service & Account Management

- Self-Service & Account Management — Information
- Self-Service & Account Management — Tools

### 12.6 Customer Health Monitoring

- Customer Health Monitoring — Information
- Customer Health Monitoring — Tools
- Customer Health Monitoring — Process
- Customer Health Monitoring — People

### 12.7 CS Program Management

- CS Program Management — People
- CS Program Management — Process
- CS Program Management — Tools
- CS Program Management — Information

### 12.8 Training Development & Delivery

- Training Development & Delivery — Process
- Training Development & Delivery — Tools
- Training Development & Delivery — Information

## 15.0 IT Infrastructure & Support

### 15.6 Customer Escalation Management

- Customer Escalation Management — Process
- Customer Escalation Management — Tools

# Core Efficiency

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## Objective 1

Simplify the flow of opportunities through partners and sales.

- Reduce the median time required to onboard a new partner integration from 30 days to 10 days.
- Increase the percentage of eligible partner transactions processed through standard interfaces from 45% to 90%.
- Increase the percentage of qualified sales leads routed to the correct owner within five minutes from 55% to 95%.
- Reduce the percentage of leads reassigned because of incorrect routing from 14% to less than 3%.

## Objective 2

Improve the reliability and efficiency of the technology estate.

- Reduce the number of applications providing substantially duplicate functionality by 20%.
- Reduce annual priority-one and priority-two service incidents from 120 to 84.
- Reduce the mean time required to restore critical services from 4.5 hours to 2.5 hours.
- Increase the percentage of material technology changes conforming to approved architecture standards from 60% to 90%.

## Objective 3

Reduce financial and data-related operational friction.

- Reduce the median financial dispute resolution time from 18 days to 10 days.
- Increase the percentage of financial disputes resolved without reassignment or reopening from 52% to 75%.
- Reduce the percentage of duplicate records in critical master-data domains from 4.5% to less than 1%.
- Increase the percentage of critical master-data records meeting completeness and validity standards from 76% to 97%.

## Capability Areas

4.0 Sales Execution • 10.0 Enterprise Risk Management • 11.0 Order Management • 13.0 Data Management & Analytics • 14.0 Technology Dependency Management • 15.0 IT Infrastructure & Support

# Core Efficiency — Capability Areas In Scope

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## 4.0 Sales Execution

### 4.2 Sales Lead Distribution

- Sales Lead Distribution — Information
- Sales Lead Distribution — Tools

### 4.8 Sales Execution Reporting

- Sales Execution Reporting — Tools
- Sales Execution Reporting — Information

## 10.0 Enterprise Risk Management

### 10.5 Business Continuity Management

- Business Continuity Management — Process

## 11.0 Order Management

### 11.7 Financial Support and Dispute Management

- Financial Support and Dispute Management — Tools
- Financial Support and Dispute Management — Information

## 13.0 Data Management & Analytics

### 13.2 Master Data Management

- Master Data Management — Process
- Master Data Management — Tools

## 14.0 Technology Dependency Management

### 14.3 Partner Integration & Management

- Partner Integration & Management — Information
- Partner Integration & Management — People
- Partner Integration & Management — Tools

### 14.6 Technology Architecture

- Technology Architecture — Information
- Technology Architecture — Tools
- Technology Architecture — Process

### 14.8 Utilization and Traffic Management

- Utilization and Traffic Management — Process

## 15.0 IT Infrastructure & Support

### 15.1 ITSM — Incident & Change Management

- ITSM — Incident & Change Management — People
- ITSM — Incident & Change Management — Process
- ITSM — Incident & Change Management — Tools
- ITSM — Incident & Change Management — Information

### 15.2 Systems Monitoring and NOC Support

- Systems Monitoring and NOC Support — Information
- Systems Monitoring and NOC Support — Tools

### 15.3 Service Request Management

- Service Request Management — Process

### 15.4 Knowledge Management

- Knowledge Management — Information

### 15.8 Reliability Management

- Reliability Management — Information
- Reliability Management — Process

# Trustworthy operations

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## Objective 1

Make compliance and internal controls consistently effective.

- Increase the percentage of key controls with an accountable owner, testing schedule, and evidence source from 68% to 100%.
- Increase the percentage of scheduled control tests completed on time from 72% to 98%.
- Increase the percentage of high-risk control deficiencies resolved within the agreed remediation period from 55% to 95%.
- Reduce the number of repeat internal-audit findings from 14 annually to fewer than 5 annually.

## Objective 3

Embed architecture and data governance into business change.

- Increase the percentage of material investments reviewed for architecture compliance before funding approval from 50% to 95%.
- Increase the percentage of critical data domains with accountable owners and stewards from 45% to 100%.
- Increase the percentage of critical regulatory and financial data elements with documented source-to-consumption lineage from 30% to 90%.
- Increase the percentage of high-severity architecture and data-policy exceptions resolved within 60 days from 35% to 90%.

## Capability Areas

15.0 IT Infrastructure & Support • 17.0 Corporate Management • 18.0 Human Resources • 19.0 Finance • 20.0 Information Technology

## Objective 2

Protect employees, information, and company operations.

- Increase the percentage of jurisdictions with validated HR legal compliance from 65% to 100%.
- Increase the percentage of critical security vulnerabilities remediated within 14 days from 58% to 95%.
- Increase the percentage of workforce and privileged accounts protected by phishing-resistant authentication from 40% to 100%.
- Reduce significant security incidents caused by preventable control failures from 10 annually to no more than 3 annually.

## Objective 4

Take each division through Sarbanes Oxley compliance

- Increase the audit success of each company division for SOX compliance from 25% to 100%
- Synchronize and validate the SOX roles across divisions to 95% similarity

# Trustworthy operations — Capability Areas In Scope

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## 15.0 IT Infrastructure & Support

### 15.5 Service Level Management & Reporting

- Service Level Management & Reporting — Information
- Service Level Management & Reporting — Tools

### 15.8 Reliability Management

- Reliability Management — Tools

## 17.0 Corporate Management

### 17.5 Asset Management

- Asset Management — Process
- Asset Management — Tools

## 18.0 Human Resources

### 18.8 HR Legal Compliance

- HR Legal Compliance — Tools
- HR Legal Compliance — Information

## 19.0 Finance

### 19.4 Internal Controls and Compliance

- Internal Controls and Compliance — Information
- Internal Controls and Compliance — Tools
- Internal Controls and Compliance — Process

### 19.8 Period Close & Consolidation

- Period Close & Consolidation — Process

## 20.0 Information Technology

### 20.3 Corporate Data Security

- Corporate Data Security — Tools
- Corporate Data Security — Information

### 20.6 Enterprise & Solution Architecture

- Enterprise & Solution Architecture — Information
- Enterprise & Solution Architecture — Tools
- Enterprise & Solution Architecture — Process

### 20.8 Data Governance & Analytics

- Data Governance & Analytics — Tools
- Data Governance & Analytics — Process