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Using Business Architecture to Ensure a World Class Customer Experience

Bill Wimsatt, Business Architect, Oracle

Stacy Rexroad, Director PMO, Brinks
Introductions

Bill Wimsatt
Director
Business Architect

Stacy Rexroad
Director PMO
Agenda

- Introduction to Business Architecture & Brinks
- Business Challenge
- Applying a Business Architecture Approach
- Business Case
- Program Approach
Agenda

- Introduction to Business Architecture & Brinks
- Business Challenge
- Applying a Business Architecture Approach
- Business Case
- Program Approach
Brinks At-A-Glance

<table>
<thead>
<tr>
<th>Industry</th>
<th>Logistics, Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission</td>
<td>To provide security–related services to banks, retailers, governments, mints, and jewelers worldwide.</td>
</tr>
<tr>
<td>Founded</td>
<td>1859</td>
</tr>
<tr>
<td>Headquartered</td>
<td>Global: Richmond, VA - North America: Coppell, TX</td>
</tr>
<tr>
<td>Size</td>
<td>Global: 650 branches in 150 countries; 59,400 employees; 7,800 vehicles – North America: 140 Office Locations; XX Employees</td>
</tr>
</tbody>
</table>

Core Business Services

- **Cash in Transit (CIT)**
  - Armored Truck Transportation

- **Money Processing (MP)**
  - Counting, Virtual Bank Facilities, Transacting

- **CompuSafe**
  - Intelligent Safes for Retail Stores

- **ATM**
  - Replenishment & Servicing

- **Coin Processing**
  - Sorting, Counting, Wrapping, Storing
“In order to globalize and grow the business, we need to understand how our business operations and processes can be globalized. We need a business transformation roadmap that achieves our goals while managing risk.”
**Tools of the Trade**

### Key Work Products

- **Strategic Planning**
  - Business Transformation Strategies and Plans
- **Business Process Transformation**
  - Process Change & Optimization
- **Change Management Enablement**
  - Readiness Assessment; Change enablement

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**Value of a Shared Services Model for Billing**

1. Local Billing Ops ($$$ - Worst Option)
2. Central Billing Ops ($ - Lowest Cost)
3. Central Billing Ops with HQ Regional Coordinators ($$
4. Central Billing Ops with Regional Coordinators ($$$ - Best Option)

---

**Current State**

Gain credibility and improve customer success by analyzing Org Change Mgmt for alignment to operating model & technology changes (e.g. moving towards a centralized, shared services model).
Agenda

- Introduction to Business Architecture & Brinks
- Business Challenge
  - Applying a Business Architecture Approach
  - Business Case
  - Program Approach
Business Goal & Challenges

**Improve Invoicing Accuracy**
- Capture est. lost revenue
- Improve Customer Satisfaction
- Contract Driven
- Transaction Linkage
- Pricing Mgmt

**Improve Process Flow**
- Contract Management
- Standardized Single Process
- Exception Mgmt
- Centralize customer experience

**Establish Business Intelligence**
- Contract Driven
- Customer Master
- Linkage across Systems
- Facilitates Customer Focused Reporting

Business Process & system weakness seems to be cause of Revenue Leak

Contracts

Where is the contract?

Field Ops & Delivery

What services do I charge at what price?

Billing & Invoicing

Capture est. lost revenue
## Initial State Operating Model

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Diversified</th>
<th>Coordinated</th>
<th>Replicated</th>
<th>Unified</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Processes</strong></td>
<td>Branch-specific business rules, complex pricing models &amp; lists</td>
<td>CIT, MP (branch consensus) Billing, Contracts (loose consensus)</td>
<td>National Accounts have central Contracts &amp; Billing</td>
<td></td>
</tr>
<tr>
<td><strong>Customers</strong></td>
<td>National Customers (regionally serviced) Small Customers (centrally managed)</td>
<td>Regional Customers (branch managed)</td>
<td>National Customers (centrally managed) Small Customers (centrally managed)</td>
<td></td>
</tr>
<tr>
<td><strong>Business Transactions</strong></td>
<td>Independent LOB Transactions</td>
<td>Cross LOB Txns for Condor Accounts (consolidated)</td>
<td>Regional Accounts - Branch replicated billing app</td>
<td>National Accounts - Single billing application</td>
</tr>
<tr>
<td><strong>Business Applications</strong></td>
<td>Custom built CIT, MP apps – LOB/branch specific code</td>
<td>Regional Accounts - Branch replicated billing app</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Data</strong></td>
<td>LOB-focused data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>IT Infrastructure</strong></td>
<td>Consensus for IT infrastructure; IT applications within LOB</td>
<td>GL, HR – centrally managed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Over 150 years branches often operated as franchises even though they aren’t
- Non-standard complex pricing models with separate price lists
- Custom built Txns & Billing Mgmt System requiring local tribal knowledge
- Multiple definitions of customer
Decentralized
• Information scattered between Call Branch, Customer Care, and Finance

Multiple Billing Platforms
• Branch Desktop applications (Smart, Excel)
• Revenue Leakage
• Manual Data Entry / Increased Errors
• Branch control of pricing and billing

Silos
• Multiple Bills for service between different branches and/or different products.
Current State Process View (for CIT)

- Replicate process for each Branch
- Use custom apps: iTrack system that feeds into SMART and NABS systems
- Legacy systems not integrated and requires a lot of manual intervention. Introduces many errors.
Agenda

- Introduction to Business Architecture & Brinks
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Business Process Transformation

Current – Future State

- Identify Problem Areas
- Model the Business Processes
- Quantify the Problem
Concept of Operations
Single, Simplified Operational Model

- Controlled contract management to reduce revenue leakage
- Simplified billing
- Centralized Customer Care & Operations Center
- Single Customer View – more unified customer experience
Organizational Impact Analysis

Organizational design needed to be analyzed to achieve an optimal value stream and business operation.

Value of a Shared Services Model for Billing

1. Local Billing Ops ($$$ - Initial State)
2. Regional Billing Ops ($$)
3. Central Billing Ops ($ - Lowest Cost)
4. Central Billing Ops with HQ Regional Coordinators ($$$)
5. Central Billing Ops with Regional Coordinators ($$ - Transitional)
How will the planned organizational design impact current staffing and operations models?
Organizational Change

WHAT IS THE OPPORTUNITY?

- Planning and executing technology-driven change from IT to lines of business
- Historically low success-rates on large IT projects
- Resistance to change from business users

HOW SHOULD YOU FOCUS?

- Collaborative OCM that integrates to OUM delivery components; enhances training, process fit/gap, and communications efforts
- Enablement focused to jump-start end user adoption strategy and plan
- Readiness and cultural assessments, stakeholder and impact analysis, engagement plans, communication strategies and plans, risk assessment and management plans, and overall adoption of change.

RESULTS

- Effective change strategy, communication planning, assessments, & job impact
- Build consensus to remove resistance to new solution
Revenue Management – Project Scope

Revenue Management is not a silo but an integral part of operations

Revenue Management Project:
Link contract, customer, price and transactions onto single platform and single process.

Oracle EBS
Customer Master
Contract Master & Repository
Products Master
Price Master
Operational Data Capture
Billing

Operating Systems
iTrack
BAMS
HEAT
iCash
Coin
PeopleSoft

Business Edge:
Integrate core operations to achieve a more optimized business flow

Sales Compensation
Customer Service
Field Service

Business Intelligence
Sales Force Automation
Agenda

- Introduction to Business Architecture & Brinks
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Business Process Revenue Management Analysis

**Close Opportunity**
- Review/Make Contract Changes
  - Negotiate Contract
  - Obtain Internal Approvals
  - Close Deal & Notify Contract Admin
  - Sign Contract

**Customer Service**
- Request Contract Changes
- Customer Care: 3000 service profile changes/month (150 top customers)
  - Capture & Log Request
  - SSS
  - Poor customer satisfaction with invoices
  - Difficult to interpret customer billing

**Author Contract**
- Create Initial Contract (customer, services, locations, etc.)
- Update contract with Changes
- Activate Contract

**Mango Contract**
- Manage Contract (Cust. Locations, Items, Services)
- Notify AE / Customer
- SSS
- Absence of Contract Management Process
- Inconsistent application of fuel service changes
- Non-BP's paper: 16-month new business

**Billing / Invoicing**
- Resolve Customer or Contract Exceptions
- Identify Exceptions if any
  - SSS
  - Lack of reconciliation between the billing rules and the contract
  - Inaccurate invoices
  - Difficult to interpret customer billing
  - Incomplete application of regular rate
  - No recognition of service level agreements
  - Independent product-specific processes that are difficult to support, manage, and control

- Finalize & Create Customer Invoice
- Resolve Delivery or Order Exceptions
- Fulfill Operations Request
Value Stream Analysis is critical to avoid sub-optimization. Consider impacts of the end-to-end process that delivers value. This is broader than solely Revenue Management.

Not initially considered, but needs to be integrated into centralized Contracts Admin. Sales force identifies customer opportunities and initial contract.

Impacted by decision to centralize Billing. Who then responds to customer invoicing questions? Raises priority of having a centralized Customer Service capability as well.
Oracle Solution & Business Case

- Connect Contracts with Billing/Invoicing using EBS and PSFT
- Get visibility within transactional business
- Centralize Financial Administration
- Analyze Financial Data using BI

Revenue Management (BRM) Project Timeline

<table>
<thead>
<tr>
<th>Definition</th>
<th>Elaboration</th>
<th>Development</th>
<th>Deployment</th>
<th>Core System</th>
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<tbody>
<tr>
<td>Q1 2011</td>
<td>Q2 2011</td>
<td>Q3 2011</td>
<td>Q4 2011</td>
<td>Q1 2012</td>
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<tr>
<td></td>
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<td>Q2 2012</td>
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<td>Q3 2012</td>
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<td>2014</td>
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<td>2015</td>
</tr>
</tbody>
</table>
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Define Your Strategy & Success Plan

**RM Mission**
Provide value-added, well-controlled and timely contract management, billing and reporting to business lines and external constituents

**RM Vision**
Provide business improved contract visibility, risk management and profitability, as well as meeting our internal and external financial reporting obligations

**PROGRAM Strategy**
Invest in people, process and technology to transform end-to-end contract management and billing business processes and related infrastructure

**Strategic Intents**
- Enhance Customer Experience
- Improve Operational Efficiency
- Improve Risk Management
- Improve Profitability

**Measures of Success by 2012**
- G&A in Contract Management and Billing is reduced
- External reporting timeline is reduced
- Lower cost of Change
- The IRMP is deployed & linked to financial processes & systems
- RM key controls are optimized
- Financial reporting EUCs are reduced

**Key Strategic Capabilities**
- Attribute-driven accounting engines
- Integrated Revenue Management Platform (IRMP)
- Multi-basis accounting and reporting
- Optimized financial and management reporting
- Optimized internal control environment
- Straight-through processing

**Mission**
Provide value-added, well-controlled and timely contract management, billing and reporting to business lines and external constituents

**Vision**
Provide business improved contract visibility, risk management and profitability, as well as meeting our internal and external financial reporting obligations

**Define Your Strategy & Success Plan**
Program to improve contract management, billing and financial processes and related infrastructure to enhance customer experience, improve operational efficiency, risk management and profitability.
Build Cross Functional Team

Revenue Management

Oracle eBusiness Implementation
Scope: Requirement, Design, Develop, Test, Implement

Data Conversion
Scope: Technical Mapping and Automation; Business Manual Clean-up

Contract Consolidation
Scope: Locate and Centralize Existing Contracts

iCash Migrations
Scope: Migrate Customers to Integrated Platforms

Org Change Management
Scope: Communications, Training, People/Organization and Process

ESC Program Management
Business and Technical Sponsors
Project Management
Business and Tech Leads
Cross Functional Team Members
Business Architecture Keys to Success

PLAN FOR BUSINESS STRATEGIC SUCCESS
• IT Solution enables business process performance

DEFINE BUSINESS TRANSFORMATION
• Business process improvement
• Leveraging out-of-the-box leading practices
• Execution and business results focus

ENABLE CHANGE MANAGEMENT
• Rapid process alignment to business strategies & goals
• Measureable business process performance improvement targets and value
• Modernize business operating platform to align to modernize business operations

Value of a Shared Services Model for Billing
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Current State
Gain credibility and improve customer success by analyzing Org Change Mgmt for alignment to operating model & technology changes (e.g. moving towards a centralized, shared services model)

Future State

Questions and Answers
OBC Enabling Services

- Strategic Planning
  - Portfolio, Optimization & Upgrade Roadmaps
  - Business Transformation Strategies & Plans
  - Transformation Governance

- Business Process Transformation
  - Business Architecture Definition
  - Process Change & Optimization
  - Process Alignment for Cloud

- Organizational Change Enablement
  - Change Enablement Services
  - Cloud Adoption Services

Oracle Business Consulting

OBC aligns client strategic objectives with realistic, value based plans and positions their organization for success.