

# A Transformation Blueprint for Client-Implementer Partnerships

Client & Implementation Partner Perspectives

# Meet the Speakers



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# What to Expect

- Why do so many financial transformations struggle?
- Success is a result of true Partnership
- People + Process > Technology

# Poll #1: Client Needs

What do Clients need MOST from Implementors?

- A. Clear roadmap & structure
- B. Proactive guidance & best practices
- C. Independent execution with minimal client involvement
- D. Transparent risks & realistic timelines
- E. Strong change & training support

# Poll #1 Results: Client Needs

# Poll #2: Implementor Needs

What do Implementors need MOST from Clients?

- A. Clear decision ownership
- B. Dedicated SME time & availability
- C. Defined scope & priorities
- D. Minimal oversight with full trust in delivery
- E. Active participation in testing

# Poll #2 Results: Implementor Needs

# Learning Objectives

1. What do Clients need in a successful implementation?
2. What do Implementors need in a successful implementation?

- Prepare & Pre-Sales
- Design & Initiate
- Build & Iterate
- Deploy & Enable
- Sustain & Succeed

# Prepare & Pre-Sales

## Client Needs

- Transparent capabilities & constraints
- Guidance from prior experiences
- Business understanding & realistic roadmap
- Continuity into implementation

## Implementor Needs

- Defined goals & success metrics
- Partnership in defining realistic scope
- Honest discovery (no hidden expectations)
- Commitment to phased approach

# Design & Initiate

## Client Needs

- Strong leadership & confidence
- Structured project plan & coordination
- Efficient & User-focused design discovery
- Early risk escalation

## Implementor Needs

- Active participation in scope decisions
- Direct access to data & SMEs
- Early clarity on metadata & hierarchies
- Involve admins from day one

# Build & Iterate

## Client Needs

- Clear, frequent communication
- Early & ongoing knowledge transfer
- Flexibility within guardrails
- Rapid iteration on feedback

## Implementor Needs

- Stakeholder alignment entering build
- Consistent engagement
- Active, meaningful user testing with defined criteria
- Shared ownership of feedback

# Deploy & Enable

## Client Needs

- Structured deployment plan
- Responsive issue resolution
- Change & training support
- Practical documentation

## Implementor Needs

- Coordinated go-live readiness
- Prioritized requests
- Clear post-go-live ownership
- Active admin engagement

# Sustain & Succeed

## Client Needs

- Resource continuity
- Ongoing advisory support
- Transparency on enhancements & impacts

## Implementor Needs

- Commitment to continuous improvement
- Clear roadmap & next-phase alignment

# The Partnership Blueprint



<b>Client Owns</b>	Goals, scope, decisions	Business rules, priorities	SMEs, testing, feedback	Adoption, change mgmt.	Ownership, improvements
<b>Implementor Owns</b>	Estimates, risks, roadmap	Solution design, best practices	Configuration, iteration	Training, enablement	Advisory, optimization
<b>Shared Ownership</b>	Success criteria	Trade-offs	Quality	Readiness	Continuous value

# Thank you!

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