



**The Internal Why,
What and How.**



The Firm of Tomorrow

Moving from the old, familiar, and often unsuccessful paradigm of platform selection to a new, insightful, driver focused paradigm involves the balance between the strategic, operational, technology and process dimensions within a firm.

The Problem with just Technology

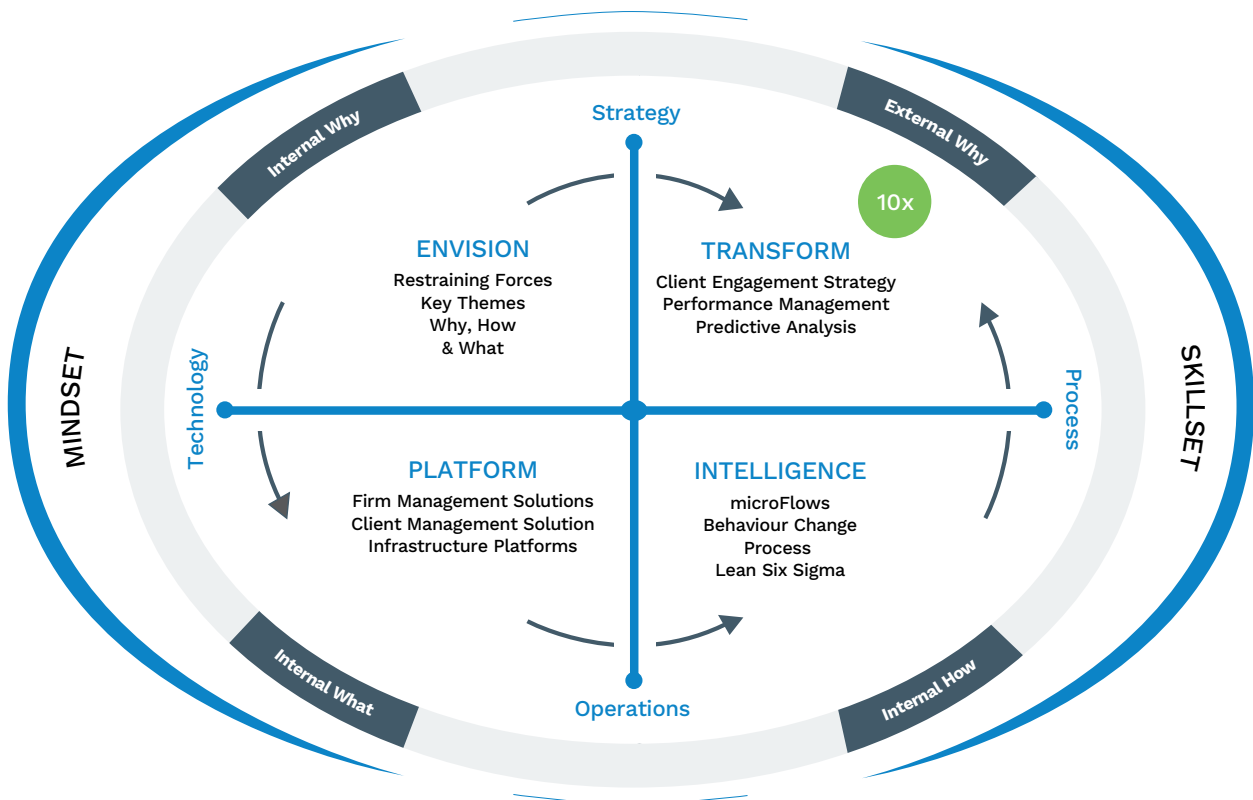
A technology platform change on its own will never deliver optimum success. All too often technology choices are seen to be “the panacea to cure all ills” with key elements of change overlooked or worse ignored (an Internal What conversation).

Most business will know that they should focus on enhancing processes beyond their current state to become more responsive to client management and engagement. Platforms that embrace flow, that support behaviour change and process, will develop assets that the firm of tomorrow will benefit by as it seeks competitive advantage and transformation in readiness for the future economy (an Internal How conversation).

The Envision™ process acts a precursor to both these change dynamics forcing the business to gain clarity of the dynamics within the business that hold it back or restrain it from achieving optimum outcomes. By understanding why these retraining forces exist the firm is able to establish a clear focus on Why change initiatives need to happen (an Internal Why conversation).

To quote Simon Sinek: “People don’t buy what you do they buy why you do it”.

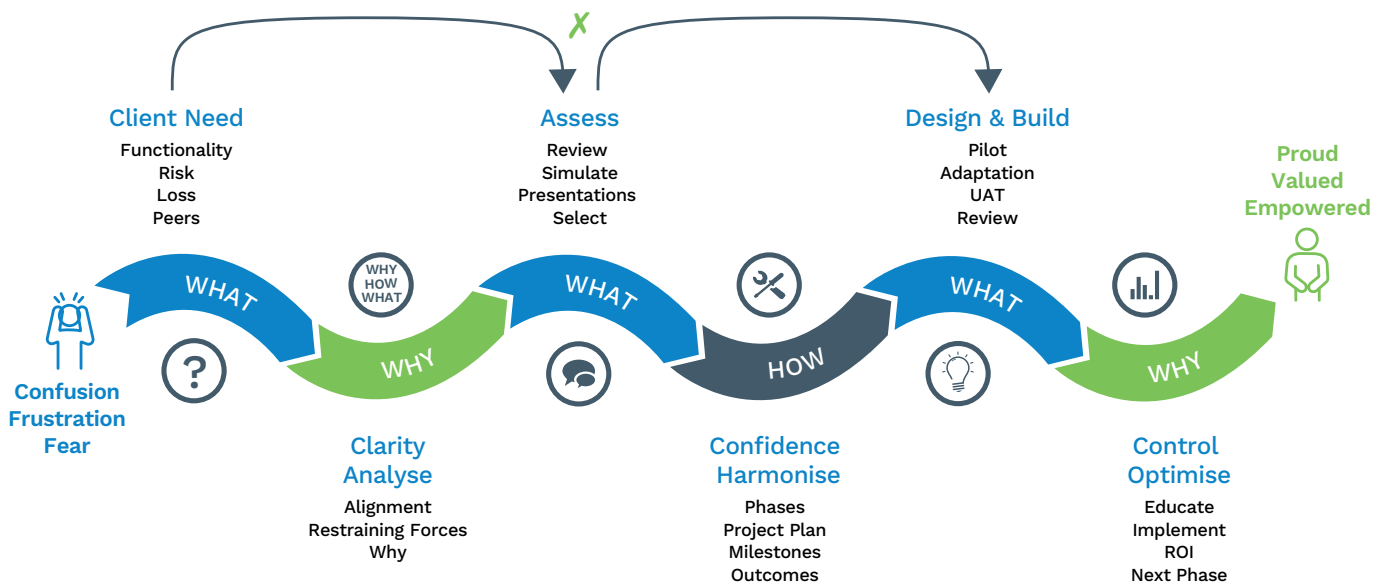
Doing Things Right (with the right things)



Overcoming Inertia

The need for a new or alternative software platform can exist for a variety of reasons. Often there is a real sense of frustration with what is currently implemented, confusion as to the nature of any options being considered and in some cases a real fear of getting it wrong.

Old Paradigm - New Paradigm



Restraining Forces

This creates a state of inertia that results in decisions being delayed or deferred that impact the firm's ability to support its organisational goals and strategic objectives.

Despite this firms will move direct to a phase of Assessment that follows an old paradigm of vendor demonstrations and completion of RFP's. Short lists follow and a final decision is made with the vendor largely in control of what is being presented against the backdrop of perceived needs. This process is complicated if the firm is not clear on what it needs and more importantly WHY.

The Envision™ methodology is used to intervene in the step from Need to Assess. It allows the firm to form a focused project team that is representative of the perceived needs of the firm.

This discovery process is conducted through an intensive workshop forum that focuses on identifying the primary restraining forces the firm faces in relation to the perceived need.

Key themes are established to provide context for what lies in behind the creation of these forces. Envision™ allows the firm to establish a common vision against which vendors will be assessed, ensuring control exists with the firm not the other way around.

8 Dimensions of Envision™

Envision™ binds the project team with a common vision and helps them communicate with clarity and context to the rest of the business.

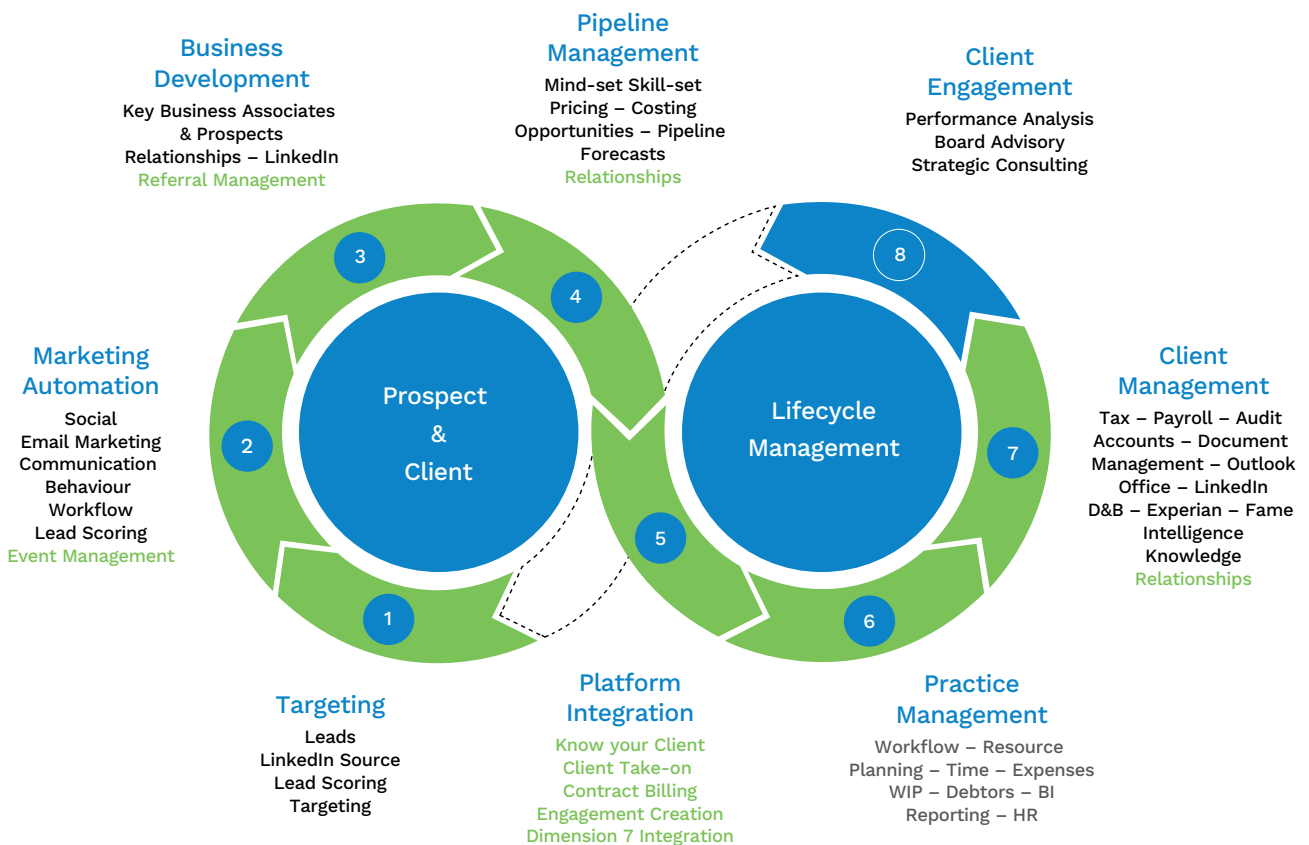
Commonality, Clarity & Context

This allows the project team to identify WHY the initiative to change exists and what the prime project goals and priorities are.

The Envision™ workshop uses the prospect and client lifecycle management framework to create a facilitate a common focus and language within the project team.

Using frameworks such as these the firm is able to identify key areas of focus and priorities which in turn help define the project scope and subsequent conversations with management boards and the firm at large.

The Envision™ Infinity Curve



Envision™ and YOUR Firm's Tomorrow

Envision™ Leverage

- ✓ Build consensus and achieve buy-in for selecting and implementing a suite of business critical technologies to build your vital Client Lifecycle Management platform.
- ✓ Understand the blind spots with existing platforms and areas of focus to improve adoption.
- ✓ Gain clarity and design strategies to facilitate the success of a project.
- ✓ Increase firm-wide collaboration and value resulting in your entire firm focusing on the right objectives at the right time.
- ✓ Benefit from decades of thought leadership and experience in facilitating technology decisions for hundreds of leading professional services firms.

Future-proofed

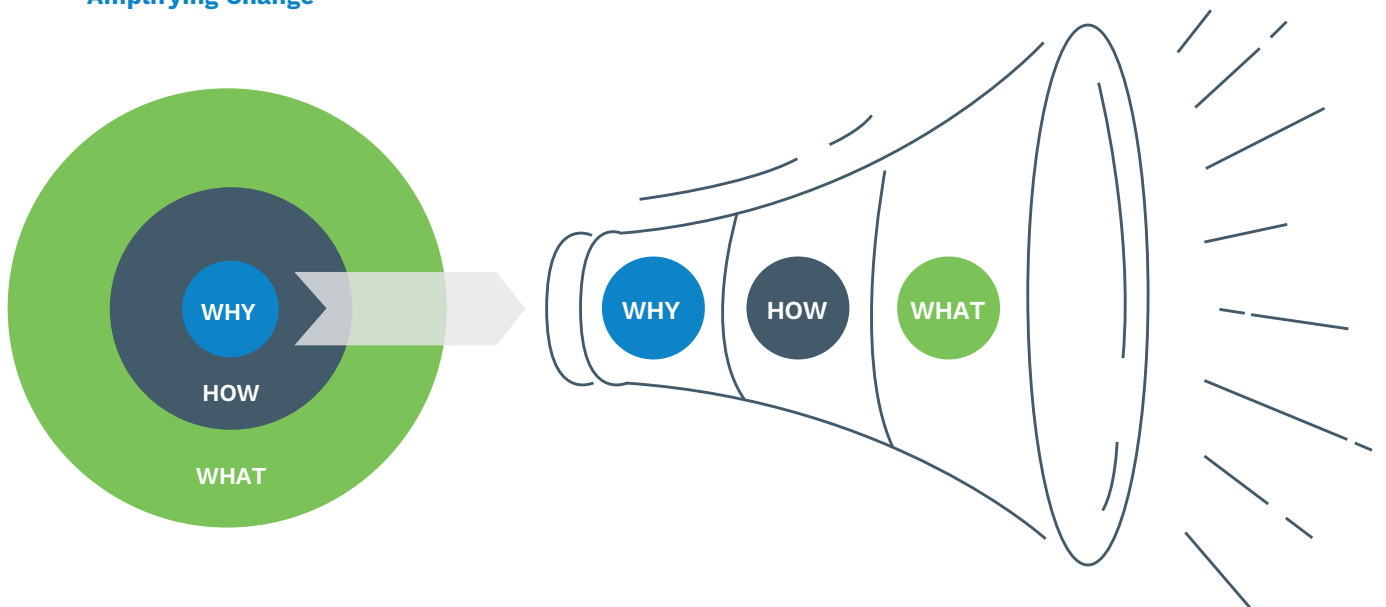
“Right from the outset, the Envision™ Process allowed us to quickly establish what was important to the project and just as importantly, what was irrelevant. The process has proved a constant source of reference, ensuring we remain on track and deliver the outcomes most important to the practice.”

Adam Irwin, Chief Operating Officer, Pitcher Partners Sydney.

“Envision™ has improved our focus, enabling the firm to have the freedom to think creatively about how to achieve the results required and overcoming barriers to success. It has helped the teams align themselves not just to their own departmental and personal goals but to the goals of the organization.”

Paul Desmond, Head of Information and Systems, Saffery Champness LLP.

Amplifying Change



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