

a2b pathway

A Guide to Successful Optimisation Projects

A person with long brown hair, wearing a brown long-sleeved shirt, is sitting on a grassy cliff edge, looking out over a vast, deep fjord. The water is a deep blue-green, and a small white boat is visible in the distance. The surrounding mountains are steep and covered in lush green vegetation, with patches of snow or ice on the higher peaks and in the valleys. The sky is overcast and grey. The overall scene is serene and majestic, suggesting a remote location ideal for focused work or reflection.

the
optimisation
company

We don't do 'off the shelf' scheduling software

It forces you to change your processes to fit the software

It can't consider anything unique to your business

It struggles to explain planning decisions to schedulers

It can be difficult for it to plan conflicting goals (reduce distance vs do work)

It often doesn't work with schedulers - but against them

It can't feedback human decisions to make better allocations

Instead, we've designed a toolbox & scheduling platform

That adapts to match your processes

That codifies the unique parts of your business

That explains planning decisions to schedulers

That resolves conflicting goals when designing

That works with planners, in an assistive way

That accepts human overrides and makes future better decisions

We have a different approach to these projects

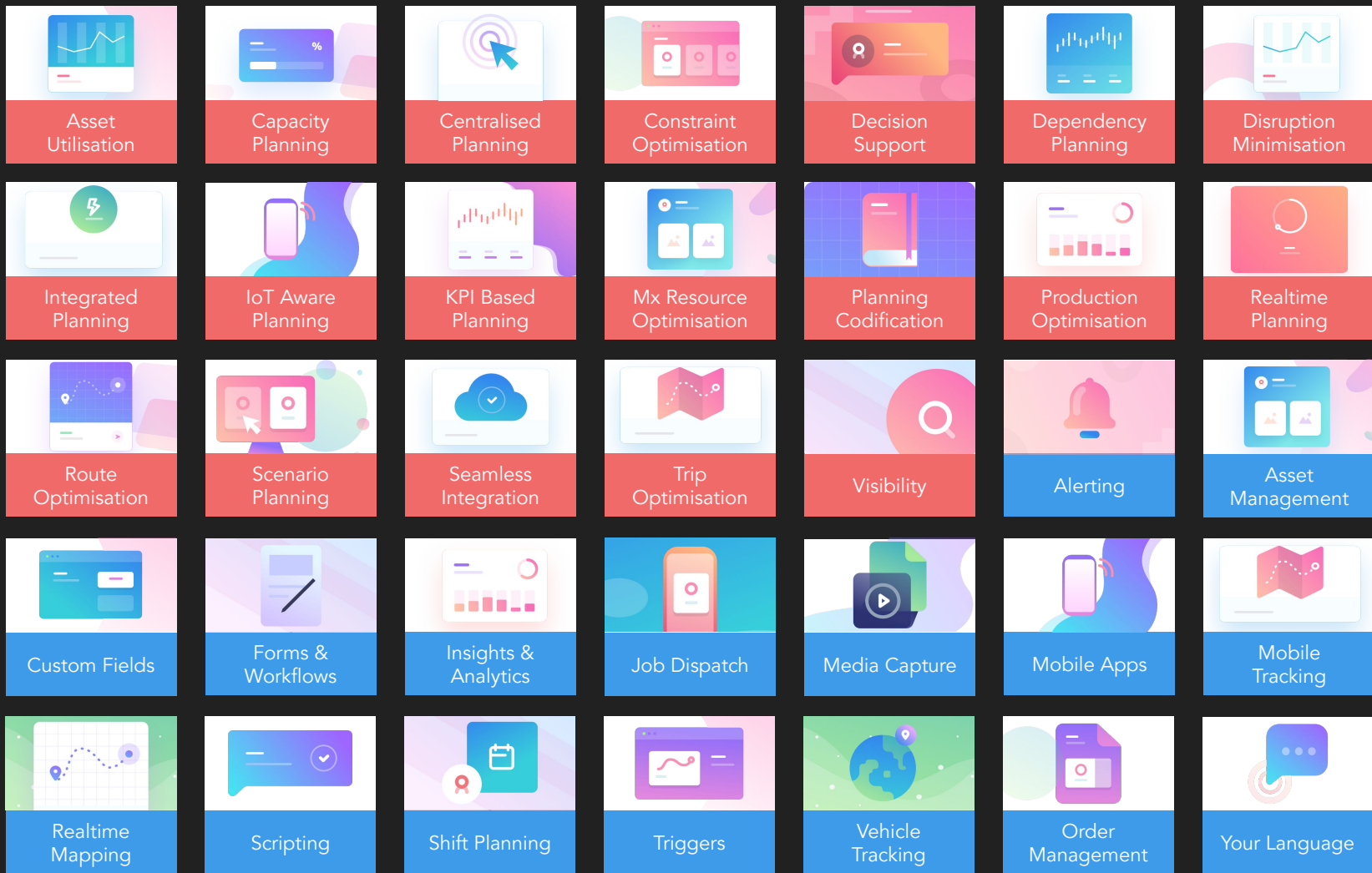
We invest in understanding your business, its processes and its goals

We've developed a toolbox of scheduling technology

We pick and configure the right elements from this toolbox to create your solution

So every customer's scheduling system is different

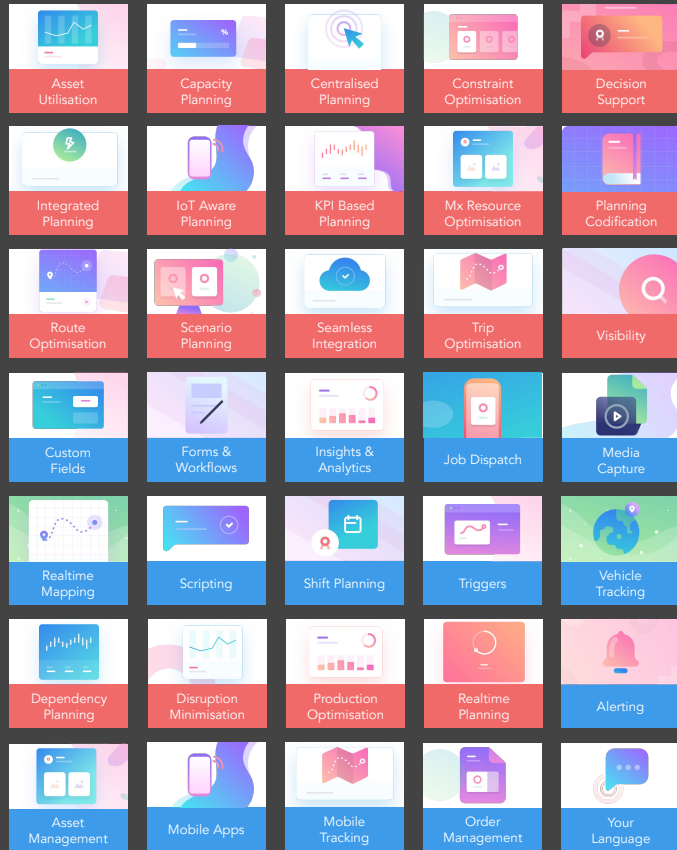
But 100% fit for their purpose, and 100% built for them



Technology Toolbox

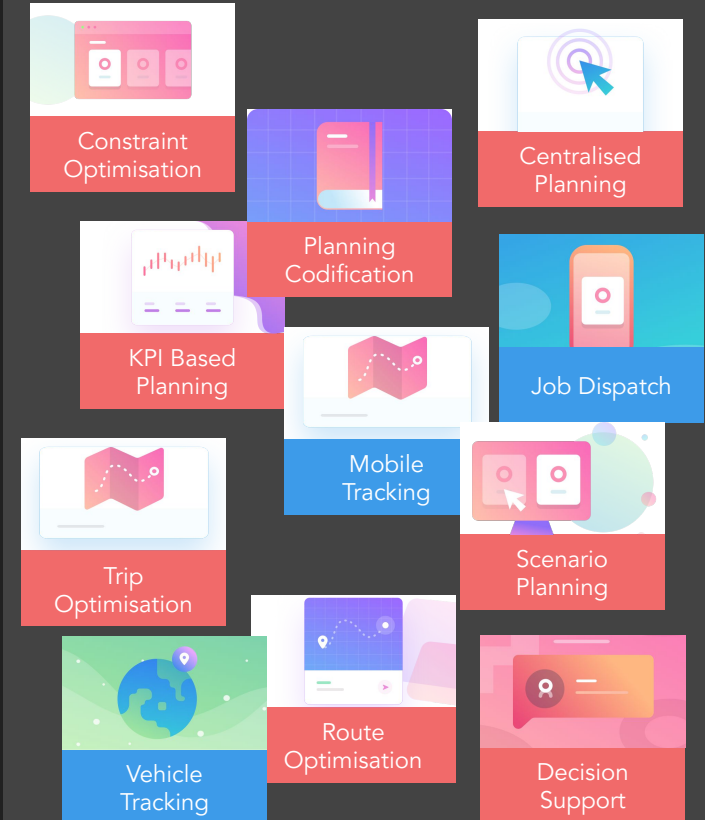
A: Insiris Toolbox

Insiris.



How do you get
from A to B?

B: Your Solution



Getting from A to B

Complex transformation projects have to get from our tech toolbox to your solution. The gap between the two is answering the **Why**, **What** and **How** of the project.

Why are you doing this?

The Value, your ROI, savings.

Save 10% transport costs
Reduce Key Person Risk
etc

What are the requirements?

The Spec of the solution - the things you need it to do.

Automatically Plan Jobs
Codify Scheduling Rules
etc

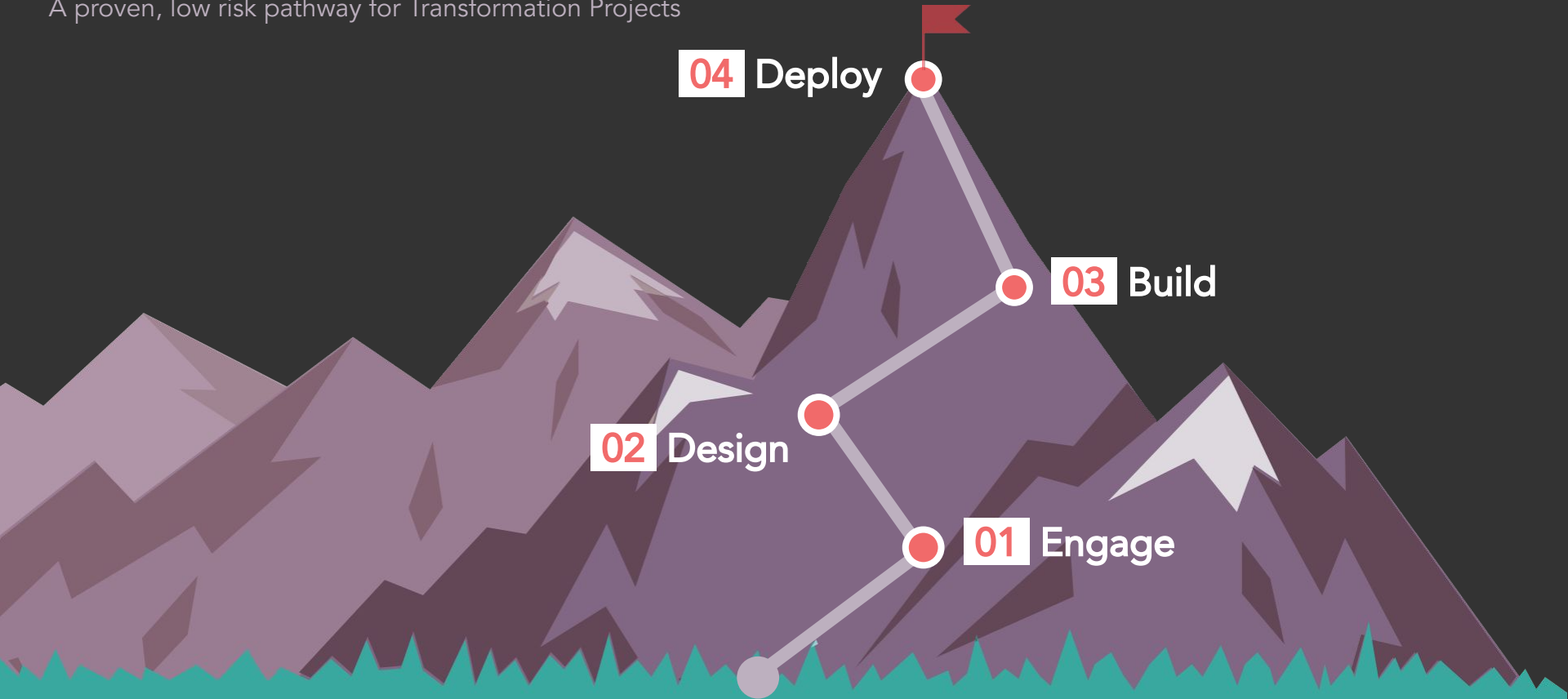
How can we do it?

What Tech do we need to employ or build.

Route Optimisation
KPI Based Planning
etc

a2b pathway

A proven, low risk pathway for Transformation Projects



a2b pathway

Answers the **Value (Why)**, **Spec (What)** and **Tech (How)** of the project through 4 key phases

01 Engage

Engage with stakeholders & business to build the ROI, answer **Value**

02 Design

Engage with users and business owners to specify requirements, answer **Spec**

03 Build

Implement spec by creating a working proof of concept, answer **Tech**

04 Deploy

Take proof of concept into production, rollout and deliver the value identified @ beginning

Build Confidence, deliver progress throughout the phases

	Outcome	Cost	Value	Spec	Tech
01 Engage	Initial Value Proposition	Free			
02 Design	Project Plan & Requirements Detailed Value Proposition	Time/Materials			
03 Build	Proof of Concept	Time/Materials			
04 Deploy	Live Solution	License			

01 Engage	Articulate the <u>Value</u> at a Detailed Level	To understand the goals of the project and align the requirements and technical spec
	Stakeholder Sponsor Engagement	Meet/speak with senior stakeholders, budget holders etc to ensure buy in
	Access & review data for analysis	Begin to understand what the elements of the solution are to answer the goals of the project
	Develop the <u>Spec</u> at a High Level	To allow stakeholders to articulate the requirements
	Develop the Value Proposition/ROI	Take the WHY + the Data to produce a quantitative proposition for value
02 Design	Analyse Data in detail	To ensure we understand how things actually work, rather than assumptions on how it 'should'
	Stakeholder Owner Engagement	Develop the requirements of the business owners and managers
	Stakeholder User Engagement	Develop the requirements of end users (planners, field teams) and possibly customers
	Articulate the Requirements <u>Spec</u>	Document the requirements formally, to develop costings and timescales
	Develop the <u>Tech</u> at a High Level	Understand what technology can be deployed from the toolbox, what needs developing etc
	Planning Processes	Incorporate/codify planning processes that will stay, help design new ones
	Methodology Specification	Approaches for planning methods - timeslot suggestion, multi phase, geographic etc
03 Build	Stakeholder User & Owner Engagement	Workshops with users and owners on an iterative basis through the building of solution
	Technology Guidance	Expertise on capabilities & limits of scheduling technology for new processes
	Implement the solution (the <u>Tech</u>) iteratively	Iteratively design and implement the solution as a Proof of Concept
	User Experience	Design & Test scheduling interface provide to end users to maximise adoption
	User Adoption	Design & implement user adoption plan & feedback loops for dispatchers
04 Deploy	Deploy system to users	Rollout the system
	Training and delivery	Create a training document/system and deliver to end users

01

Engage

A

Articulate the Value at a Detailed Level

B

Stakeholder Sponsor Engagement

C

Access & review data for analysis

D

Develop the Spec at a High Level

E

Develop the Value Proposition/ROI

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- 01 Gather Experience**
Support generating scheduling requirements alongside transformation teams
 - 02 Data Analysis**
Data analysis of past scheduling to drive good decisions for new processes
 - 03 Planning Processes**
On site expertise creating new planning process flows for all work streams
 - 04 Methodology Guidance**
Approaches for planning methods - timeslot suggestion, multi phase, geographic etc
 - 05 Technology Guidance**
Expertise on capabilities & limits of scheduling technology for new processes
 - 06 Prototyping**
Creation of small, isolated scheduling prototypes to test & validate processes
 - 07 User Experience**
Design & Test scheduling interface provide to end users to maximise adoption
 - 08 User Adoption**
Design & implement user adoption plan & feedback loops for dispatchers

Scheduling Project Elements

The Pathway works hand in hand with our 8 Steps to Success for Scheduling Projects.