

# SOLUTION PROFILE

## MANUFACTURING ASSESSMENT AND PLANNING SERVICES

### STRATEGY MAP

#### BUSINESS RESULT

A Strategy MAP engagement will create a "future state" vision for desired plant or enterprise improvement projects. We help you reduce risk by aligning with your manufacturing strategy, leveraging legacy investments, and using industry-supported standards. The engagement results in a success-oriented plan that achieves the expected business return.

#### APPLYING DOMAIN EXPERTISE

The Strategy MAP engagement will draw from Rockwell Automation's population of Subject Matter Experts (SME's) to develop a strategy for your business process. Whether it is in Automotive, Food & Beverage, Pharmaceutical, or Consumer Packaged Goods, the team of Rockwell Automation strategists will bring real world implementation experience using the latest tools and technologies to develop the strategy to solve your identified business issue. The Strategy MAP team will develop an understanding of the "As Is" conditions by confirming the current business strategy; conducting a high-level assessment of key processes, performance drivers, technology infrastructure, organizational structure and alignment of current initiatives. Then the Strategy MAP team will create a future state vision which integrates desired business, process and performance targets with the associated technology and organization enablers required to reach this future state.

*The Strategy MAP is one of three MAP offerings from Rockwell Automation, the following table shows a high level description of activities for each offering and what's included in each.*

OFFERING OVERVIEW			
Activity/Deliverable	Assessment	Value	Strategy
Engagement Duration	1 Day	2 - 5 weeks	4 - 6 weeks
Operational and Business Issues	✓	✓	
Class of Solution Recommendations	✓	✓	
Plant Tour	✓	✓	✓
Detailed Interviews		✓	✓
Industry Benchmark and Best Practices Statements	✓	✓	
Estimated Business Value		✓	
ROI Estimate and Prioritization		✓	Optional
Customized Report and Presentation		✓	✓
High - level User Requirements			✓
Data and Process Flow (As - Is)			✓
Future State Process Flow			✓
Implementation Roadmap			✓
System Architecture			✓
Budgetary Project Cost Analysis			✓



#### MITIGATING IMPLEMENTATION RISK

The Strategy MAP team will develop a risk mitigation plan through identifying all activities regarding operational functionality, implementation cost and delivery timelines. This plan is developed with your personnel and our SME's so that you fully understand what the impact to your business will be.

#### CREATING IMPLEMENTATION TIMELINES

Developing a realistic timeline for project implementation can only be performed if the team creating it has experience implementing solutions. Our SME's have real world implementation experience so a realistic schedule can be developed.

#### DERIVING BUDGETARY ESTIMATES

At the completion of the Future State Design and Risk Mitigation phase, Rockwell Automation has enough information to provide a budgetary estimate to implement the strategy for your capital improvement budgetary cycle. The estimate includes functional and detailed design phases, typical software costs, and implementation and start-up costs. The future state requirements developed are technology independent and are collected and tabulated for your use in developing several estimates if required.

#### OPTIONAL FINANCIAL SERVICES

As a part of the Strategy MAP, Rockwell Automation can develop a financial return regarding your business issue and the effect it has on the bottom line. Using your own financial data and published benchmarks from your industry peers, together we can pull together a tangible financial summary including Payback period, Net Present Value, and Internal Rate of Return.

# STRATEGY MAP - DETAILS

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The Strategy MAP engagement is designed as a multi-day activity with a scope from a single facility across to an enterprise. Our MAP Engagement team meets with your team at the chosen facility with direct contact with plant management, operational team leaders, schedulers and other critical resources as our main source of information.

All Strategy MAP process are customized to your particular needs, however the following outline will give you an indication to the content and activities of a typical engagement:

### ON -SITE ACTIVITIES

**Off site Kickoff Teleconference** – This is an initial teleconference with the executive sponsor and the key Strategy MAP sponsor to discuss the on-site Strategy MAP process, what is needed during the session and overall Strategy MAP schedule expectations.

**Introductory meeting with key site leadership** – This is an informal meeting with key operations team leaders that will be most effected by the process changes the Strategy MAP will result in. Conversations on setting expectations of the project. Process and subsequent deliverables.

**Plant Tour** – It is important for us to directly view the targeted manufacturing area and obtain a full plant tour surrounding the desired areas of improvement.

**Focused Interview Sessions (Multi-day)** – A critical part of the Strategy MAP engagement is derived through a series of one on one interviews with key individuals\groups within your facility to drive out high level business and user requirements. All engagements are custom but we typically interview plant schedulers, raw material coordinators, Engineering, IT, Plant Controllers, Production Operations, and plant management. Depending on the size and scope of the engagement we may also include corporate staff to gain there insight as well.

**Assessment Review Session** - Rockwell Automation facilitates this review to present the findings of the on site efforts. The requirements are reviewed and the expected operational changes are discussed. An agreement is obtained on the remaining activities to complete the assessment off-site and/or to establish the overall plan to move you towards solving the issues identified in the assessment.

### OFF-SITE ACTIVITIES

**Data Compilation and Analysis** – The Strategy MAP team will summarize and crystallize the information gathered off-site into succinct user requirements and tabulate them utilizing an ISA-S95 standards format. Utilizing the S95 standard ensures that all requirements are noted in a standard format understood by all manufacturing vendors and ensures technology independence.

**Follow-up Phone Conferences and web meetings** – Based on the data analysis, key individuals may be needed to refine issues by teleconference and possible web meetings. The conferences are typically no longer than 1 hour and are scheduled through the project champion. The objective of these review sessions is to develop agreement on requirements and answer questions.

**Develop Solution Strategies and Architecture** – Complete research into prospective solutions and potential investment. Summarize both tactical and strategic justifications.

**Develop Financial Summary (optional)** – The payback time (ROI) or rate (IRR) of the project will be portrayed in tabular summary format. This figure will be based on an estimated fixed price for solution costs and a most-likely estimate of financial benefit.

### FINAL REVIEW

**Final Deliverable** – The Strategy MAP deliverable is in a Word document format. A web meeting will be setup to review a high level PowerPoint describing the project.

### THE STRATEGY MAP DELIVERABLE AND NEXT STEPS

The Strategy MAP delivers a project strategy that captures preliminary user requirements, high level solution architecture, budgetary cost estimates, and an initial implementation plan. This engagement and delivered project plan enables you to mitigate project risk during the capital appropriation process for your implementation towards targeted improvements.

[www.rockwellautomation.com](http://www.rockwellautomation.com)

#### Power, Control and Information Solutions Headquarters

Americas: Rockwell Automation, 1201 South Second Street, Milwaukee, WI 53204-2496 USA, Tel: (1) 414.382.2000, Fax: (1) 414.382.4444

Europe/Middle East/Africa: Rockwell Automation, Vorstlaan/Boulevard du Souverain 36, 1170 Brussels, Belgium, Tel: (32) 2 663 0600, Fax: (32) 2 663 0640

Asia Pacific: Rockwell Automation, Level 14, Core F, Cyberport 3, 100 Cyberport Road, Hong Kong, Tel: (852) 2887 4788, Fax: (852) 2508 1846