



Roadmap for Business Transformation & Vendor Selection

The Client

The client is a retail company facing intense competition and market domination from established giants. They sought to break into this challenging market with a robust strategy and consolidated technology.

The Challenge

The client needed a strategic solution to effectively compete in a highly regulated retail market dominated by a retail giant. They were struggling with the inefficiencies of using 30 different software applications and required assistance with consolidating their technology and CRM. The core challenge was to equip the client with the right strategy and business model to penetrate and grow in this established market.

Our Solution

We analyzed the client's projects and roadmap to recommend an agile strategy that integrates ongoing operational and technical improvements with their strategic projects. The next part of the solution was to provide customized agile training that specifically meets the client's requirements.

The goal of the training was to help with technology implementation, estimation, and story writing. Our team trained two Agile groups, totaling 32 members. We then partnered with stakeholders, guiding the client to identify and focus on key projects through the MoSCoW method.

Here are some other solutions that we offered the client:

- » Identified productivity applications, infrastructure, business applications, and process recommendations.
- » Assisted with a few projects to minimize hours and costs spent on the project.

- » Recommended a single application— Office 365—and educated them about the application to manage all their business operations instead of using 30 different applications.
- » Developed a way to centralize customer communication in Dynamics CRM.
- » Educated the client teams on vendor selection, negotiations, and checking references.
- » Set up the complete IT roadmap and provided a 360-degree view of the customer data with CRM and marketing automation integration.
- » Created the Statement of Work (SoW) for the client to help them ask their vendors to implement their CRM solutions.

Results

Leveraging our solutions, the client enhanced their business strategy through Agile adoption. The key results we brought to our client's business are:

- » Less time and money spent on projects with agile training and assistance.
- » Increased productivity and efficiency by using a single application (Office 365) for all business operations.
- » Faster decision-making and improved project prioritization with the MoSCoW method.
- » Enhanced vendor selection, negotiation, and customer communication due to well-trained team in agile methodologies.
- » Quick turnaround time and improved decision-making by Project Managers and Business Analysts.

Key Benefits

- » Complete IT roadmap for the client.
- » It empowers the client to make strategic vendor selections and achieve favorable negotiations.
- » Every team is trained in Agile to enhance focus, streamline decisions, accelerate delivery speed, and improve issue escalation.
- » Day-to-day tasks are prioritized and sorted with an agile approach.
- » Substantial boost in productivity and efficiency with the cut down of 30 applications to a single one.

About Veltris

Veltris is a Digital Product Engineering Services partner that delivers next-generation technology and industry solutions across the healthcare, technology, communications, manufacturing, and financial sectors.

Veltris enables clients to build, modernize, and monetize smarter products and platforms powered by Connected Industry AI solutions. Through an experience-centric approach, agile delivery, and differentiated talent, Veltris helps businesses optimize product development cycles, monetize platform investments, and drive transformative outcomes in niche micro industries.