

Business process transformation
accompaniment projects with

Talamus

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1 Our Mission

Create possibilities and accompany you in implementing them.

We are convinced that autonomy and co-development are key elements to the success of a digital transformation project. Therefore, we have adopted a "**Citizen Development**" approach for all our projects. This method allows users to understand, participate, and evolve their applications without resorting to code. To achieve this goal, training, coaching, and task assistance are essential to equip stakeholders with the necessary skills.

Our approach is iterative and continuous. We establish an action plan, prioritize needs to ensure an effective start, and determine key deliverables using the 80-20 approach. We aim to maintain a steady pace and prefer progressive implementation rather than waiting for a fully finalized product. Users are encouraged to actively participate in the project.

2 What is Citizen Development according to Copilot?

Citizen development is a concept that allows non-professional individuals to create software applications without the need for extensive coding knowledge. These citizen developers use low-code or no-code development platforms, which provide a visual development environment to quickly and easily build applications.

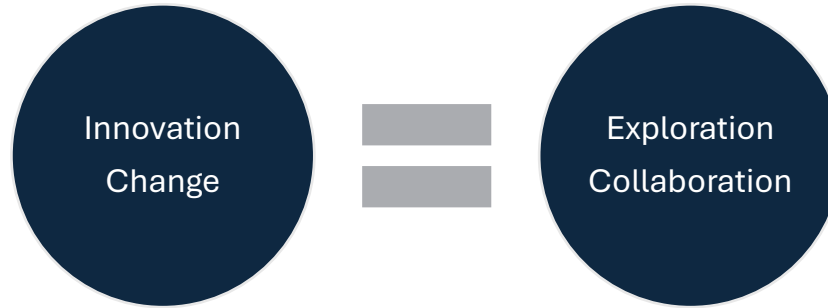
This type of development allows employees to create customized solutions to solve specific problems within their organization without relying on traditional IT departments. For example, they can use tools like Microsoft Power Platform to develop applications that improve processes and operations within their company.

Citizen development promotes autonomy and innovation by allowing users to understand, participate, and evolve their applications without resorting to code. This often requires adequate training so that stakeholders can acquire the necessary skills to achieve their goals.

3 What is support for Talamus?

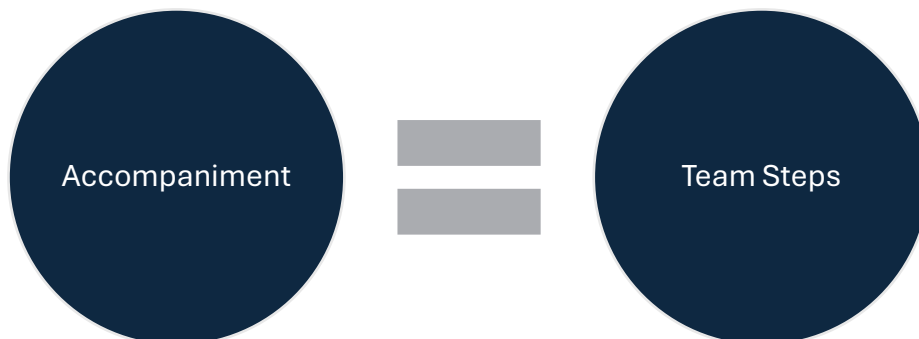
The changing and complex environment in which organizations operate requires an exploratory approach, a strong learning culture, and autonomy to identify innovative and effective ways of working.

Transformation accompaniment with Talamus



Our accompaniment approach balances training, coaching, and task assistance. It involves training all project stakeholders so that they can fully and concretely participate in the implementation of solutions. This includes co-development workshops to find solutions together and share tasks for developing solutions. Our approach proposes that the Talamus team develops the most complex elements requiring expert skills. Meanwhile, the organization can contribute to aspects more within its reach, reducing project costs and allowing a better understanding of the solution, more effective discussions with experts, and the search for solutions with optimal return on investment.

In a transformation accompaniment project, Talamus acts as a trainer, coach and participant.



4 Our areas of expertise

4.1 Process Automation

We help you increase your productivity by automating your processes. Imagine an



environment where repetitive tasks are eliminated, documents are approved automatically, information flows efficiently, and your processes become smoother thanks to automation.

We support organizations in the implementation of solutions integrating Microsoft 365, SharePoint, Copilot, Power Platform, Power Apps, Power Automate and other similar tools.

4.2 Customer Relations



We help you implement customer experience and relationship management tools with the following objectives:

- **Increased sales:** Better customer experience management improves satisfaction, encouraging long-term engagement.
- **Effective tracking of prospects, service offers, service calls, etc.:** CRM tools facilitate tracking with your customers for your calls and service offers.
- A well-structured customer process facilitates the centralization of data, enhances visualization, and enables the creation of accurate sales forecasts, **resulting in a more predictable sales process.**
- **Standardization of customer processes and reduction of variability:** Automation and digitization of customer processes will simplify and standardize them for your entire team.

We support organizations in implementing Dynamics 365 and optimizing Microsoft 365 tools in a sales and customer relationship context.

4.3 Document Management



We help you manage and classify your digital files efficiently. The goal is to create an environment where each document has its place, with well-planned information security and optimized use of storage spaces. Document management transforms disorder into structured organization.

We have developed a document management approach aimed at improving business processes. This method considers the entire process, including not only file structure but also all tasks and interactions of different stakeholders. It adopts a consistent approach in an increasingly collaborative and agile work environment.

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We accompany and support you in implementing effective document management methods with Microsoft 365, Microsoft Teams, SharePoint, Microsoft Purview, Microsoft Archive, Copilot, and Power Automate tools.

4.4 Communication and Collaboration



We help you optimize collaboration, information sharing, and communication across your teams.

- **Improve internal communications:** New digital spaces improve communication, reduce emails, and increase efficiency.
- **Create effective collaborative spaces:** These spaces reduce task duplication, allow team work on files, and help break down silos.
- **Increase organizational memory:** Collaborative workspaces centralize information, making it easier to find and transfer knowledge.
- **Promote team agility:** New digital spaces provide employees with the tools they need to accomplish their tasks with flexibility and agility.

We support you in implementing collaborative structures and tools, including Microsoft 365, Microsoft SharePoint, Microsoft Teams, Planner, and Project.

4.5 Data and Business Intelligence



We help you transform your data into strategic decisions. Imagine a digital environment where data is a source of accurate and powerful information. KPIs and dashboards become tools for informed decisions. Optimize the use of your business data.

We accompany and support you in developing a robust and efficient data culture through the Microsoft Power Platform, including Power BI and Power Apps.

5 Typical course of the accompanying programme

This is typically done in 6 phases.

1. Exploratory meeting
2. Stakeholder training
3. Co-development workshop
4. Solution design and planning
5. Team development of the solution
6. Implementation, change management and training

5.1 Exploratory meeting

The exploratory meeting frames the project, establishes the reasons for the project, and its general objectives. It also aims to define personalized training paths for the different project stakeholders. These paths include a selection of courses from over 100 training sessions and conferences on Microsoft 365 tools and digital leadership skills.

5.2 Stakeholder training

The different project stakeholders start their learning early through our live, expert led training platform. They can independently register for the various training and conferences offered. Each session is led in real-time by our experts via Microsoft Teams, allowing participants to interact and ask questions.

Training is essential to provide a solid knowledge base and strengthen the overall technological culture. Well-trained stakeholders facilitate and make workshops and exchanges more effective. Project expectations are then better aligned with reality.

5.3 Co-development workshop

Co-development workshops integrate knowledge transfer, mapping and analysis of processes, brainstorming sessions to design applications, automations, and new working methods. Their goal is to develop specifications, governance and security, and plan the next steps and iterations of the project.

5.3.1 Working iteratively is key to success

Working on a digital transformation project iteratively is essential to success. This requires a coherent vision rather than random implementation. Iterative management allows achieving progressive objectives, promoting agility, experimentation, and better change management.

5.4 Project planning and solution development

After the workshop, we establish a schedule including milestones, project meetings, training, coaching, and development periods. A project generally lasts between 3 to 6 months. Despite our commitment to project success, meeting precise and tight deadlines remains a challenge. The responsibility for deadlines is shared with our clients and depends on the complexity of the process and the availability of stakeholders.

5.5 Developing as a team with Talamus

Developing as a team means that both the organization and Talamus must actively participate. We train and coach super-users and key process people in configuring Microsoft 365 and Power Platform tools.

Super-users are brought to execute simple developments that do not need to be entrusted to Talamus expert developers. Our team handles more complex tasks, such as starting applications, Power Automate flows, and Power BI reports, so that organization stakeholders can maintain and improve them independently. Our team is always there to support you and work with the organization when time is lacking or when more advanced skills are needed.

5.6 Implementation, change management and training

It is well known and documented in the industry that the success of a digital transformation project as well as change management largely depends on the quality and quantity of training provided to end users.

5.6.1 Training, Talamus' DNA

We are passionate trainers and coaches about knowledge transfer. Our experts train all types of users on Microsoft 365 tools, modern leadership and management concepts.

Each project requires training tailored to the specific needs of users. Our innovative platform offers over 100 training courses to ensure the success of digital transformation projects. By developing customized training paths for each project through our platform, we offer very competitive prices, abundant content, and great agility and flexibility, allowing optimal results.

We also offer private training tailored to the specific needs of organizations, with content based on current trends and innovations.

5.6.2 Reducing resistance to change

At Talamus, we advocate simple, agile, and viral change management, based on strong digital leadership from managers. We also encourage a coaching approach for key stakeholders, as well as the implementation of quality and sufficient training and communications.

In the article "Smoothing the Path to Innovation" (Gartner, HR Leaders Monthly, May 2022), four friction points are identified that prevent an idea from gaining traction in an organization. Here are the highlights and our comments:

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- Inertia. The desire of a human being to stick to the status quo, despite the imperfection of the status quo. (We know there is a better way to do things, but we are comfortable with our current way of doing things!)
- The cognitive effort required. (Not surprisingly, change requires effort.)
- Emotions. It is anxiety, fear, apprehension, the intimidating side of change. (How to overcome emotional frictions that hinder real change?)
- Reactance. It is the aversion to being changed by others. (If we feel that a change is imposed on us, we will resist with equal, if not greater, force... Even if it is a good idea!)

To mitigate frictions, we suggest...

- Focusing on co-design and collaboration to build belonging
- Making the unfamiliar familiar
- Making change an experience and an adventure

6 Stakeholders, roles and responsibilities in a transformation accompaniment project

To ensure smooth progress, it is essential to determine roles and responsibilities. These also represent a joint commitment to the project.

The Sponsor

Sponsors are the people who carry the project and act as leaders. They approve investments, mobilize stakeholders in the project. Project designers and project managers report to them.

- **Responsibilities:**
 - Participation in strategic meetings
 - Proactivity in decisions

The Champion

Champions are internal super-users who can act as citizen developers. With the support of our team, they can design, modify, and manage applications, reports, Power Automate flows, and various business process elements.

Champions receive training and support from our team. By collaborating with internal champions, our goal is to offer maximum autonomy and promote agility.



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They play an important role in the project's success and user adoption. They have a good understanding of the organization's business processes and understand the needs of end users and sponsors.

- **Responsibilities:**
 - Participation in training
 - Involvement and contribution to development
 - User management and security assignment

The Project Coach

The project coach must coordinate stakeholders, track milestones, organize meetings, and motivate the team. Although our team values project management, we cannot be solely responsible. It is recommended to find internal support for project management.

- **Responsibilities:**
 - Tracking and communications
 - Ensuring all stakeholders are mobilized
 - Ensuring deadlines are met

The IT Partner

The IT partner must ensure the compliance and security of technological environments and help manage through administrative consoles.

- **Responsibilities:**
 - User, license, and access rights management
 - Opening and optimizing Power Platform environments
 - Managing Microsoft 365, SharePoint, Power Platform, and Azure administrative consoles

The Project Committee

The project committee includes all project members (Sponsor, Champion, Coach, IT). We recommend creating a Microsoft Team to manage the project, converse, track tasks, and store files.

End Users

Gather all organization members who will work and participate in the new business process. Their adoption is crucial. Even with an excellent process, nothing is possible without end-user buy-in.