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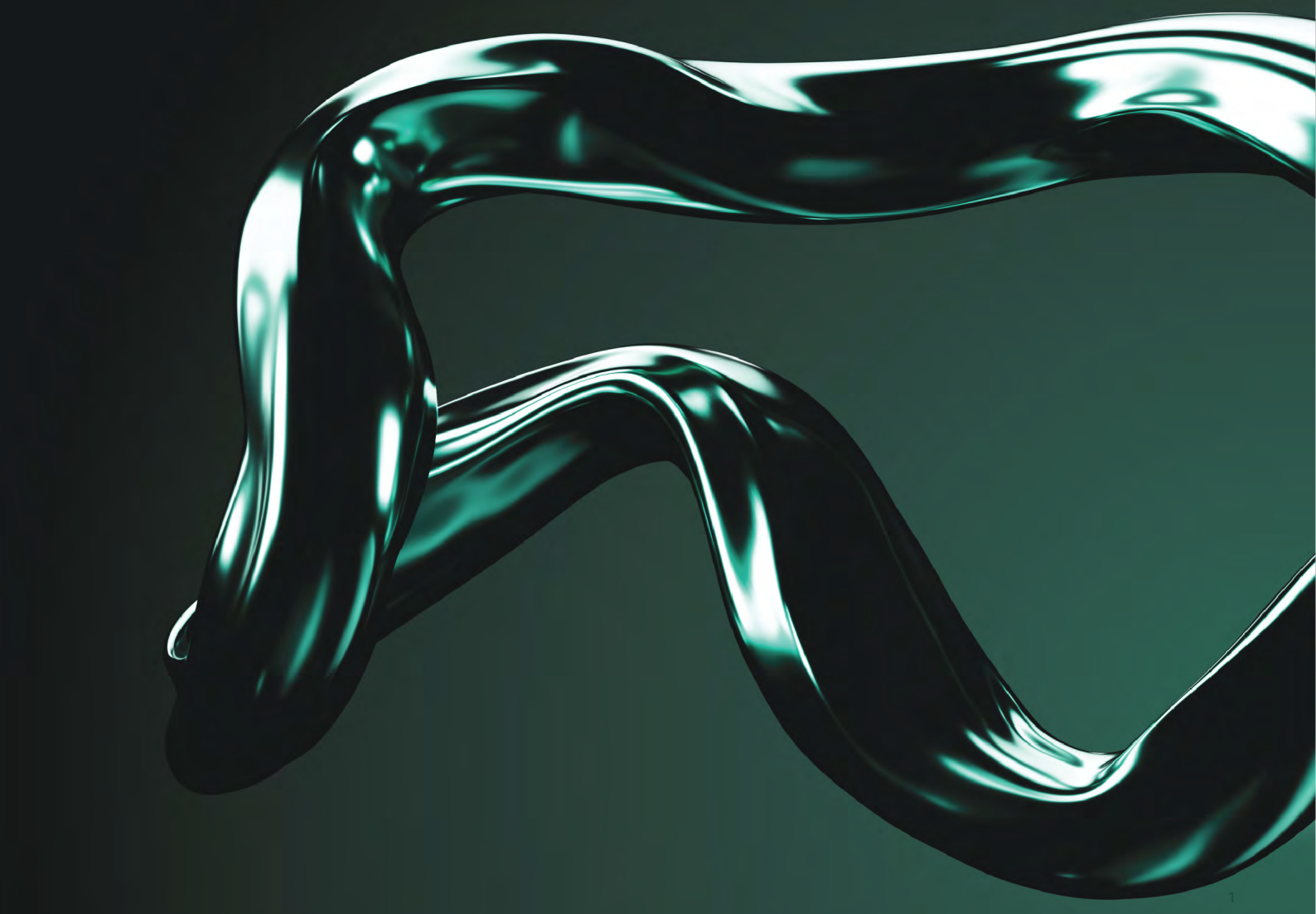
Systematic Rollout Framework

A Resource-Efficient Approach to Implementing IT Systems on a Global Scale



Abstract

Digital Transformation is a complex task for any company, especially on a global scale. As a global leader in the technology consulting industry, Nagarro has helped many companies accomplish this transformation via a structured and scalable process we refer to as the **Systematic Rollout Framework**.

The Systematic Rollout Framework provides a structured approach, complete transparency and measurable action plan to enable lean and efficient enterprise digitalization. This whitepaper outlines the mechanics of applying the framework in a real-world context.

The process-oriented approach enables the involvement of various teams in the organization, breaking down silos and results in frictionless collaboration, increased transparency and 'sense of belonging'.

However, multiple variables involved in developing an enterprise solution cause resource waste, making it challenging to execute the process-oriented approach and a single source of truth. Standardizing and digitalizing business processes, change management and a lack of technical knowledge can further complicate this process.

Moreover, the costs of digital products are on the rise, with the enterprise software market projected to reach $312.82bn in 2025 and grow to $376.42 bn by 2028, that is $88,53 per user in 2025 and respectively $105,26 per user in 2028.

To tackle these challenges and ensure efficient resecure allocation, Nagarro's **Systematic Rollout Framework** identifies all implementation, project and change management activities on a strategic level, and creates a replicable, consistent and measurable delivery system.

(Source: https://www.statista.com/outlook/tmo/software/enterprise-software/worldwide#revenue)

Challenge

In an increasingly interconnected global business landscape, digital transformation is no longer optional, it's a strategic imperative. Yet for many organizations, especially those with a global footprint, the process can be overwhelming and complex.

We recently applied the Systematic Rollout Framework to implement Salesforce Service Cloud at a global temperature-controlled logistics company, significantly improving their operational efficiency.

This White Paper shares this approach, aiming to support companies worldwide in achieving their transformation goals with precision and positive outcomes.

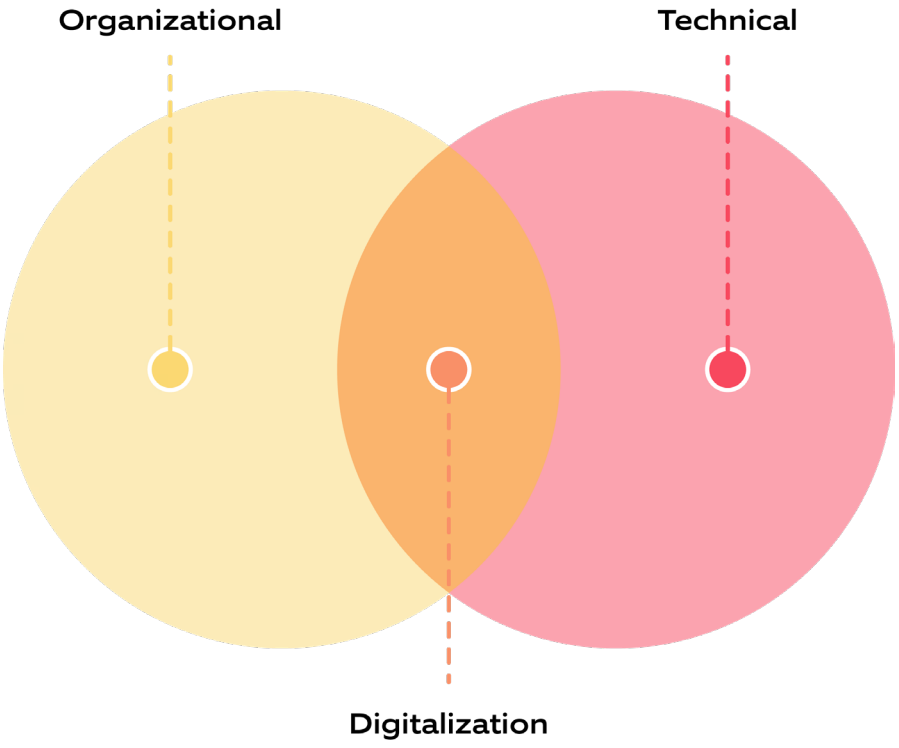
As is true for the introduction of any new technology, digital enterprise products must be aligned to the business processes to provide high added value to a company.

Products from the same vendor (like SAP, Salesforce or Workday) can significantly vary between companies and use cases. These products can be further customized with low code to adapt to specific business needs.

However, this flexibility can also lead to two possible extreme outcomes:

1. Over-customization: Applying complex automation logic or investing in over-engineered solutions that require substantial maintenance efforts.
2. Under-customization: Re-engineering business processes to fit the product's default, or "vanilla" version rather than adapting the product to better align with existing business processes and workflows.

These two extremes are often a result of three main groups of process challenge: Technical challenges, organizational challenges and digitalization challenges.



Technical challenges

Out-of-the-box digital enterprise products provide relatively low business added-value. Although there might be a lot of supported functions within the product, the standard versions tend to be too generic to address the specific, real-world use-cases for most companies.

For example, a Customer Relationship Management (CRM) system might support general sales processes out of the box, but sales processes can differ widely—even between companies within the same industry, and even more so between companies across different industries.

After their procurement and implementation, these digital products become an integral part of the company's IT infrastructure (Digital Enterprise Architecture) and must be maintained as the company grows and develops over time. It is not only how they are set up as a standalone system, but also their relation and implication to the other systems in the company.

The "Where to start?" dilemma

Each digital enterprise product has its own ecosystem and functional landscape. Having deep product knowledge is crucial to creating an effective product-related business strategy and maintaining a high-level, forward-looking product vision. Being able to distinguish the product's limits, and what it takes to extend them, gives a clear outlook on the implications.

Many organizations lack the deep technical understanding of the product to develop and/or customize the product to support their specific use-case. Companies can get trapped in the "Where to start?" dilemma and usually start building from the bottom-up.

This approach, however, can lead to the resource wastage, creating technical-baggage and negatively affecting the Digital Enterprise Architecture.

Organizational challenges

Humans are generally resistant to change, which makes a sustainable organizational change management process a critical factor in any successful digital transformation.

The realization of the business value of a newly implemented digital product starts when intended users are trained on the proper use of the new product and can validate whether the new product (or a new version) supports their use-cases.

Regardless, in practice there is often user pushback before an implementation starts, especially from the operational stakeholders who are most impacted by the impact of the change. Additionally, the start of a new project can represent a major disruption in their daily work, since they need to be involved in different project implementation stages.

Other factors that can play a role are governance and project management. Many companies face challenges with a lack of project management resources or know-how. Although most companies have specialized teams that focus on internal IT or digitalization projects, they might be overburdened if multiple projects must be managed simultaneously.

Physical distance between business units can be another factor that can impact project implementations, due to cultural and time management challenges (often due to time-zone differences).

Digitalization challenges

Digitalization challenges emerge when technology meets organizational change. New systems can reveal gaps between current and desired states in both technical and organizational dimensions.

For example, the type of product chosen, and the degree to which its functionality and interface differ from the previous system will determine the level of training and adaptation required by employees.

This transition can create friction across three key areas:

1. **Company-wide process compliance**
2. **Technical legacy issues (technical debt)**
3. **Mitigation of organizational and technical personnel challenges**

Company-wide process compliance

Process standardization across business units is often challenging due to inevitable discrepancies stemming from factors like organizational and technical maturity, local regulations, specific market needs, regional cultural behaviors, and legacy processes from past growth.

Some processes may be outdated, creating bottlenecks in the current state. It is crucial that organizations review and refine these processes before digitalizing them, based on their impact and complexity. It is critical that the technical solution is based on the organizational need to achieving a single source of truth. Therefore, a compromise in alignment between the technical and organizational aspects might be necessary, opening the "internationalization vs localization" strategy discussion.

Technical debt – Implications and mitigation strategies

Technical debt refers to outdated, inefficient software, systems or hardware components within a technical solution or a process, that hinder innovation, creating additional financial implications. As organizations evolve, technical debt accumulates from both hardware and software sources due to organizational and technical changes over time.

This phenomenon is inevitable, since every procurement will transform into technical debt over time. Therefore, procured digital products must fit the digitalization roadmap of the company, which will help estimate to which extent the organization is prepared to absorb the opportunity cost.

There are three ways organizations can address this challenge:

- Scrap the technical baggage entirely by investing in a new system or infrastructure – a long-term strategy with considerable upfront investments offering high scalability potential.
- Absorb the opportunity cost of the technical baggage by investing in integration of legacy systems or infrastructure – a mid-term life cycle strategy, aimed to extend the lifetime of the infrastructure and offers limited scalability potential.
- Temporarily ignore the technical baggage by running a new system or infrastructure in parallel – a short-term strategy or a "band-aid solution" that enables certain functions and processes. High-risk over long-term, due to limited, disconnected workflows producing poor-quality siloed data.

Considering these challenges is crucial before creating a product or system rollout strategy for a digital transformation on a global scale.

Mitigation of organizational and technical personnel challenges

Strong leadership and clear governance structure are essential elements of a successful organizational transformation. A mix of strong organizational culture, tenure, deep knowledge of current processes and product knowledge is the perfect blend for a leading role.

However, employees matching this profile are often scarce within companies, and it is likely that such people will be involved in multiple simultaneous engagements internally, creating possible bandwidth issues.

A well-defined product rollout strategy incorporates a governance structure where the leadership is involved in low-touch/high-impact approach and the transformation responsibilities are matched and delegated to the project team's skills. This setup allows for efficient time allocation and creates a wide governance/project management team dynamic.

Systematic rollout framework

– building blocks, planning and execution

By anticipating and addressing potential challenges early, organizations can significantly improve the success rate of their digital transformation projects. Creating a clear, structured delivery framework helps teams plan ahead and navigate changes more effectively.

After analyzing the challenges and pitfalls in the categories mentioned above, we created the **"Systematic Rollout Framework" - a lean delivery system** focusing on consistency, speed, agility and reducing waste.

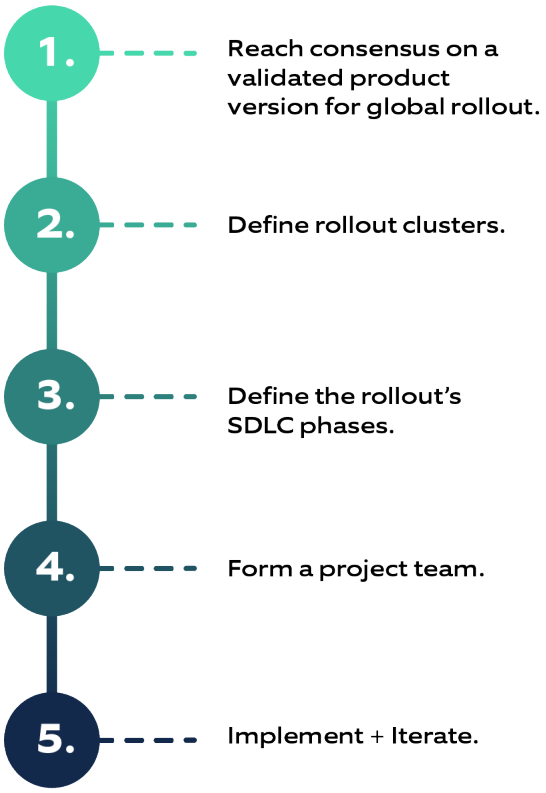
The framework

The Systematic Rollout Framework's aim is to discover and estimate all the activities required during a successful digital transformation. The findings or activities are assessed and grouped in two categories – **"Constants"** and **"Variables".**

The 'constants' represents assets that can be produced with a one-time upfront resource investment. Their value will materialize over the length of the transformation since they are utilized repeatedly, for example training materials, discovery questionnaires, onboarding sheets, etc.

The 'variables' are activities where a project team is actively working. They require proactive resource and risk-mitigation planning.

Grouping these activities enables the framework set-up and facilitates the planning of a high-impact change management structure. Each of these blocks presents a prerequisite to the subsequent block and should be addressed in this sequence.



Blocks one to four set the foundation and dictate the success of block five, which constitutes most of the project activity allocation, i.e. the digital transformation delivery.

1. Agree on a validated product version for global rollout

Adhering to a validated version is crucial to success in this approach, as it ensures standardization and repeatable rollouts across the organization's global business units.

It establishes a uniform user experience across the organization aligned to a value-driven business process resulting in lean workflow, data quality and a higher degree of belonging among the employees.

A viable product version must satisfy at least 20% high-leverage activities that enable 80% of the users' daily operations.

When developing a new digital product, organizations have two main approaches: creating a Minimal Viable Product (MVP) or upgrading an existing solution. There are many factors and assumptions to be considered, but on a framework level, both a Minimal Viable Product (MVP) or an upgrade to an existing version are viable options.

The critical challenge is ensuring the product meets organization-wide needs. A solution that only serves a small group of business units won't work with this framework approach for a company-wide implementation. The product must be comprehensive enough to the relevant communities across the entire organization.

While some business units may not initially align with the new product's functionalities, this issue will be addressed in later planning stages. The product version remains a consistent element throughout the digital transformation process. The criteria to overcome this challenge are explained in the subchapter "Define the SLDC phases per cluster".

Referring to the two main categories described above, the product version is a "constant" throughout the transition.

2. Define rollout clusters

Clustering the business units across the organization is the second building block of the Systematic Rollout Framework, and it provides strategic clarity on a project level by establishing a resource allocation plan and rollout timeline. Clusters can be defined by different criteria and granularity depending on the organizational structure.

One potential approach is to organize clusters by geography.

Geographic clusters are likely to have the same or very similar cultural backgrounds, local management and are in close physical proximity.

Three benefits of this approach:

- **Simplified change management** – Geographical clusters ensure better communication and knowledge sharing between the stakeholders since they are familiar with each other through regional collaborations.
- **Improved efficiency during discovery** – Overlapping business processes across units can accelerate the discovery phase of the System Development Life Cycle (SDLC) within each cluster. More detailed implications in the upcoming chapter.
- **Physical proximity factor** – Simpler planning and shorter travel times for business visits and collaborative activities.

Clustering is typically not optimal in every scenario. However, by strategically standardizing approximately 80% of clusters, project teams can effectively manage outliers without difficulty. These clusters are aligned to the rollout plan as "Waves," with individual success evaluated against predefined KPIs.

This clustering approach establishes a clear governance structure and provides high-level insights into the user types and quantities within each Wave. Consequently, the clustering outcome produces an additional stable component—the Wave configuration.

3. Define the rollout's System Development Life Cycle (SDLC) phases

Even though these projects do not involve product development, they involve transition from the current (AS-IS) to a future (TO-BE) state. Consequently, it is crucial to measure the gaps between these two states. Organizations must train the users for implementation and offer post-implementation support for smooth transition and higher adoption.

Based on the first two stages of the framework, organizations can decide if the product version is viable and can be rolled out to business units as Waves (as defined above). The rollout usually involves the following stages:

- **Pre-kickoff** – Definition and briefing of all key stakeholders, setting expectations of the engagement and alignment on timeline and resource allocation.

  The phase is aimed at securing stakeholders buy-in, resource and timeline commitment and defining and setting up a cadence with the business units.

- **Discovery** – Analysis of the AS-IS situation of each business units, both on the organizational and technical level, informing operational stakeholders of the upcoming change and upcoming activities in securing high system adoption.

  The phase results in documenting the AS-IS state using predefined forms with managing stakeholders, including process diagrams, completed questionnaires, and charts highlighting key findings. It also includes a Fit-Gap analysis outlining differences and implications between the AS-IS and TO-BE states.

  Following this, the stakeholders decide if each business unit in the wave progresses to the next phase or moves to the "parking lot." Additionally, the team documents the system configuration requirements for each business unit.

- **Configuration** – In this stage, the technical team configures and tests the system for each business unit, based on findings from the discovery phase.

  The phase definition remains general because requirements and deployment methods depend on specific use-cases, business needs, the system implemented (ERP, CRM, WMS, etc.), and the chosen deployment approach(es) (Agile, DevOps, SCRUM, etc.).

- **User training/User Acceptance Testing (UAT)** - The user training focuses on the core components and workflows of the new system. It is aimed at bridging the gap between the current technical skills and workflows and the expected workflow or process changes in the new environment.

  To accommodate the users' learning preferences and stimulate an engaging learning environment, organizations can follow various approaches such as:

  » **Trainer-led interactive sessions** that blend theoretical and practical explanations, hands-on exercises, knowledge-checks, and Q&As, and ensure an inviting and engaging environment where participant feel free to ask questions.

  » **Centralized knowledge portal** that hosts content across formats like short videos, one-pagers, recorded sessions and presentations on standard and more advanced functions. Users can revisit standard function topics and skill up.

3. Define the rollout's System Development Life Cycle (SDLC) phases

Since the framework's purpose is not to develop new product features, the UAT is conveyed as part of the user training phase. And the project champions test only whether the configuration done in the previous phase complies with their environments.

- **Go-Live and hypercare** – Organizations must clearly communicate a cutover plan before the Go-live date. After validating the cutover, the organization can roll out the system and begin the hypercare phase.

  If critical issues requiring immediate fixes ("hot-fixes"), the organization can initiate another go-live attempt. If significant issues persist and validation fails, the rollout is considered unsuccessful and must be rescheduled.

  This setup establishes a lean post-Go-Live support:

  » Sets up a centralized system to log user issues and questions, supports managing and delegating action items within the project team, improves transparency, and helps identify recurring issues. These insights can then be documented in the knowledge portal for future mitigation.

  » Schedule and communicate drop-in support sessions before Go-Live, allowing users and project champions to directly connect with the project team to resolve issues. This provides users with a safety net, reducing anxiety and uncertainty during the transition, and fosters an open, collaborative environment where everyone feels they're working together toward a common goal.

What happens to the business units that don't pass the discovery phase?

Business units that didn't comply with the said product version and fail the discovery phase are marked as edge-cases and held in the parking lot. These business units are put on a hold and either covered in upcoming waves or taken out of the scope based on the deciding factors:

» The gap-fit between the business unit's organizational and technical maturity and the product's version.

» Strategic importance of business unit's onboarding.

These factors are measured against the goal of the Systematic Rollout Framework, which is enabling an entire service region in a rapid manner.

If a smaller business unit has significant organizational or technical challenges and is not ready by the configuration phase, it is placed temporarily in a "parking lot." Later, the project team and stakeholders review whether the resources required to mature this unit justify its onboarding.

If resource investment exceeds the expected value, onboarding the unit is deferred beyond the current project timeline, reducing immediate resource pressure and long-term management challenges. Not using the "parking lot" risks causing delays in each wave, wasting resources, and undermining stakeholder confidence.

For optimal resource allocation, a hybrid of Waterfall and Agile models is recommended. This approach clearly defines phase transitions while offering the flexibility to run phases concurrently and includes buffer periods for addressing stakeholder needs.

4. Forming a project team and onboarding it to the Systematic Rollout Framework

Completing the first three building blocks provides clear insights that help address initial assumptions. Defining team roles and staffing depends on various factors, but is simplified by leveraging the Systematic Rollout Framework.

Team members should have combined expertise in product knowledge, organizational structure, change management, and technical skills. Although detailed coding isn't required, technical knowledge remains crucial for system configuration, impact assessment, and communication with technical stakeholders.

Team members must thoroughly understand both the strategic goals of the transformation and the workflow principles of the Systematic Rollout Framework. Building a centralized knowledge base with insights into the organization's culture, technology, ongoing projects, and transformation objectives helps create a solid foundation and facilitates rapid onboarding of new team members when necessary.

5. Systematic Rollout Framework execution - Rollouts and approach iteration

The last planning activities before the execution includes defining success metrics and a centralized documentation structure (knowledge center) for each wave.

The success metrics can be both quantitative and qualitative, but must be measurable and aligned to the project's strategic goal.

The documentation is a focal point of the Systematic Rollout Framework and must be maintained throughout the transformation, therefore the knowledge center is a single-source-of-truth for document storage.

Categorizing documents as 'constants' during the initial bucketing exercise eliminates redundant manual work and maintains data quality. To achieve this, the documentation must be templatized as much as possible.

A few aspects that may help setting up a basic knowledge center include:

- Informing the clusters and keeping the business units involved
- Discovery questionnaires, stakeholder matrix and trainer training guides
- Client's business case, technical documents on product, licenses, and dependencies
- Data from the functional stakeholders etc.

Execution of the Systematic Rollout Framework

Once all building blocks are in place and the stakeholders are aligned, the wave rollouts may begin. However, we recommend that organizations begin with a pilot wave. This helps to review the success of the first wave and forms the basis for the required improvements in consequent waves.

Pilot wave – Explicit and implicit benefits to the entire transformation

Pilot waves must be isolated, with a buffer time allocated after the delivery where the teams can incorporate the learnings to the rollout approach. This helps set a clear benchmark and expectations for the future Waves and eliminate any assumptions.

The business units in the pilot may be randomly picked, but it is recommended that they are culturally close, within a similar time-zone, under one regional management, without language barriers, and all can be physically close. This approach will ensure a controlled and balanced Wave and produce accurate insights.

After the Pilot's kick-off, the project team (project manager and/or business analyst) must align all stakeholders on the expected workflow and start developing the document structure for each phase. It is crucial to set the foundation at the beginning to secure early stakeholder buy-in and collect as much insights that could be analyzed later.

Since it is a controlled phase, it is a good opportunity to test the discrepancies in each phase. This information will be later used to set barriers and safe-gates, for example business units' threshold from discovery to configuration or parking lot; time buffers for time-sensitive activities; technical document formats for data upload; involvement of vertical and horizontal departments/stakeholders; etc.

After the pilot is delivered, the project team and stakeholders analyze the gathered data, strengthen the weak points and decide whether any additional components of the Systematic Rollout Framework can be standardized. After incorporating all lessons learned, the rest of the rollouts may start.

Rolling out the rest of the waves follows the same repeatable process, with the benefit of full control of all project aspects, bucketized in 'constants' and 'variables'. It enables the team to work in a reactive environment, where bottlenecks and risks can be forecasted and timely mitigated to ensure timely project delivery with no timeline breaches.

Conclusion

Digital transformation is a complex orchestration of organizational, cultural, and technological elements—especially on a global scale. The key to accomplishing rapid and consistent delivery is distinguishing between the fixed foundations and the fluid elements of change.

By identifying the constants - the stable, strategic elements you can invest in upfront, you free up resources to navigate the variables with agility and precision. It's about creating a robust framework that enables flexibility where it creates the greatest impact.

The Systematic Rollout approach provides a structured breakdown, complete transparency and measurable action plan to secure lean and efficient enterprise digitalization.

We have been using the **Systematic Rollout Framework** for digital transformation projects for many years across different industries and organizational structures. A recent, very successful project, for example, was the global Salesforce Service Cloud implementation at a leading temperature-controlled logistics company.

Together with our client, we onboarded and trained 500+ users across Europe across 62 business units. They achieved the transformation in 10 months instead of the planned 12 months.

After the successful implementation in Europe, we applied the framework across business units in Asia Pacific, resulting in a reduction of active project involvement by 20-50% as a direct impact of the training sessions. The post-implementation user queries were reduced by 85-100% by streamlining the Go-Lives. Touchpoints with strategic stakeholders were reduced by 50-100% with heavy use of templates and reusable collaterals.

Leading this transformation, we onboarded 400+ users and enabled 30 business units across Asia Pacific, Australia, New Zealand, Singapore and Vietnam in only 7 months.

Additional Success Factors

Change management and cultural considerations

Another crucial success factor in any digital transformation is change management. It is very important to understand the process of change from the end user perspective and proactively lead the project with the goal to minimize the impact on the daily work of the users.

It is also very important to connect and resonate with the culture of the region we are working in. It will help the team to connect with the users on a personal level, understand their implicit and explicit behaviour to the project and, most importantly, mitigate any misunderstanding due to cultural differences.

Stakeholder mapping

In order to establish effective communications across stakeholders, we divide them into strategic and operational functions. Our team acts as a tactical mediator between them and steers the project to the strategic goal, ensuring efficient stakeholder involvement, to eliminate or minimize resource waste.

The operational level stakeholders are the people from the business units that are directly involved in the change process. They are involved in day-to-day communication during the Wave and are the integral stakeholder to the rollout success. The operational stakeholders include each business unit's project champion, power users, IT support, project managers, etc.

The strategic level stakeholders are the people at the product and management level. If executed properly, they should be hands-off during operations and involved for reporting and strategic decision purposes.

Benefits of setting up a knowledge center

Creating simple manuals on FAQs, system features, process execution and storing them in an easily accessible place is key to increasing users' adoption, easing the change process and diminishing the need of repeated user trainings. The documents used for user training can be stored there as well. It also creates a healthy habit for the users, making it a first point of reference for any open questions.

The knowledge center needs to be maintained and kept up with new features and developments to stay relevant. The content may vary and be adjusted based on your user group. Since everyone learns differently, it is good practice to provide various formats like long and short videos, one-pagers, text documents with screenshots from the system etc. It is recommended to store it in a version-controlled environment, like Confluence and if possible, to insert a hyperlink on the system's user interface.

About the author

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Bojan Shlakeski is a Senior Salesforce Consultant at Nagarro's German Salesforce Practice, advising European and global companies on digital strategy, system and process design, vendor assessments, and change management. He has led major Saleasforce initiatives, including a multi-continent Service Cloud rollout and greenfield Salesforce implementations for organizations in the US, Germany, and Denmark. Bojan focuses on people-centered digitalization and applies System Design Thinking principles in his work. He holds dual Master's degrees in Management of Information Systems and Business Informatics from HS Pforzheim and SEB Ljubljana.

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