



# GROWING TOGETHER IN THE AMERICAS

DIGITALISATION FOR INTERNATIONAL TRADE  
CHALLENGE



# Agenda

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1. Important announcements
2. Operating model
3. Why redesign the operating model? – internal and external drivers
4. Adding value to the operating model
5. Q&A



# Attention!

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Take advantage of the **Q&A session** to ask questions.

1. Please focus on questions related to the topic so that your colleagues can benefit from them. Avoid asking very specific questions about your business.
2. The **chat** is reserved for comments you want to share. Remember we are reading you!
3. Remember that in the **ConnectAmericas Academy** in the section Topic 3, class 3 this material is available in English, Spanish and Portuguese.
4. This is a learning environment, we come to learn, to make mistakes, to reflect, to change our minds, **and it's all good!**
5. If you have any problems, please contact us at:  
[creciendojuntas@connectamericas.com](mailto:creciendojuntas@connectamericas.com)
6. No olvides completar la encuesta al final de la clase para darnos tu opinión  
<https://forms.office.com/r/Da8w1qevmB>  
¡Lo tendremos en cuenta para las próximas clases!

## Oscar Perez

*Senior Manager – Business Consulting*

Oscar leads our Business Transformation practice in supply chain and operations. His career has focused on business process transformation projects across multiple companies and sectors.

Additionally, he has held leadership positions in Strategic Planning, Organisational Design and Future Operating Models (TOM) for businesses throughout Latin America.



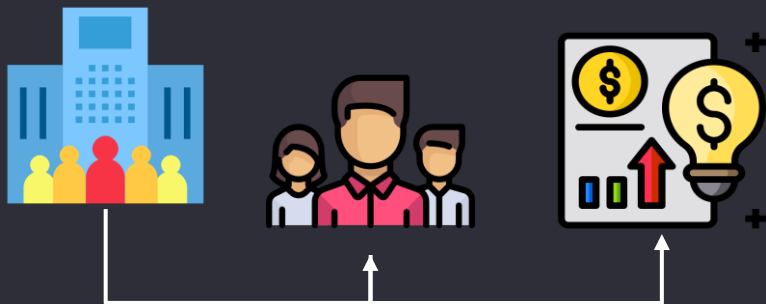
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**A business model  
describes the rationale  
for how an organisation  
creates, delivers and  
captures value.**

# Business model v. Operating model

## Business Model

- Describes **what kind of value** is generated.
- Defines the **customer segment** to which the value proposition will be delivered.
- Defines the **key resources** and **activities** in the value chain.



## Operating model

- Determines **how value is generated**.
- Defines the **processes, technology and people** needed to develop the value proposition.
- Defines the **information systems** to manage internal processes.



# What is an operating model?

## Characteristics

- Determines how an organisation generates value.
- All productive activities that generate **added value**, benefits and profits for the customer.
- The main elements of the operating model are people, **processes** and technological tools.

## What should we focus on when creating our operating model?



Customer-centric approach



Value chain - Agile tools



Flexible business model



Competitive advantages



Cultural and workforce transformation



Measuring impact



# An operational model seeks to answer the following questions...



What do we do?



Who do we do it for?



How do we do it?



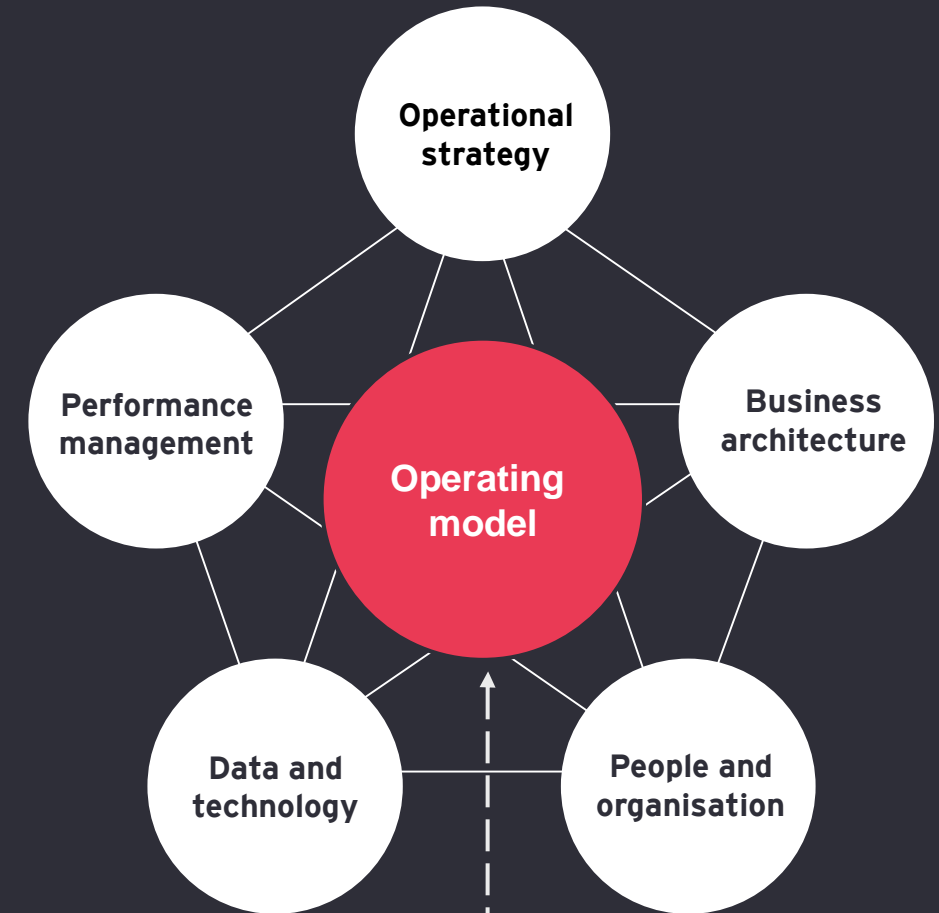
How do we organise ourselves?



How do we measure and control our business?



Where do we do it?



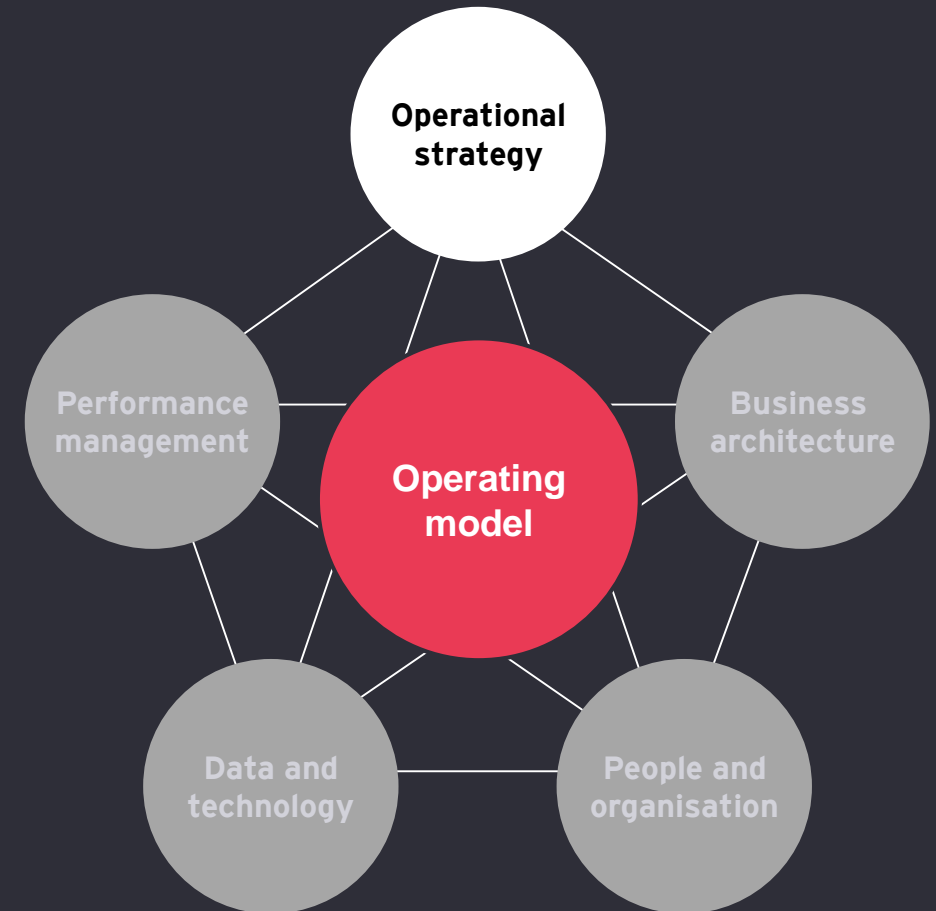
The answers to these questions lie in the **5 dimensions** of the operating model



## Operational strategy

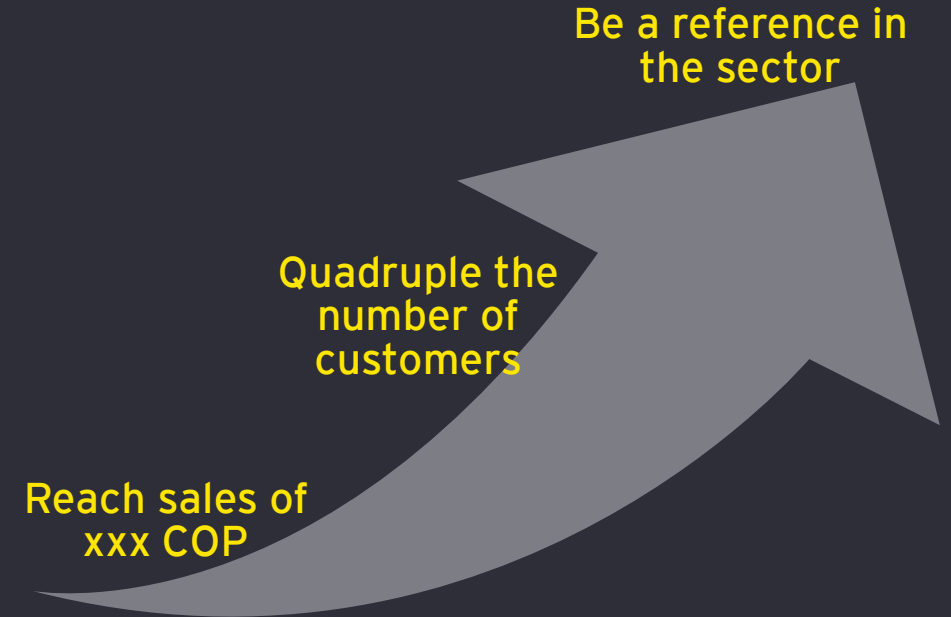
Definition of a set of frameworks that enable the operationalisation of the strategy (e.g. risk/compliance frameworks). It should be aligned to the **value proposition**.

- Define short, medium and long-term initiatives that are aligned with business, product, customer and risk objectives.



## Operational Strategy

Go 2 Market	Ser el mejor "xxx" para xxx clientes
Demand Activation	Leverage the activation of the demand
Enhace categories	Mantain producto Share
Suppliers	Redefine business relationships with suppliers



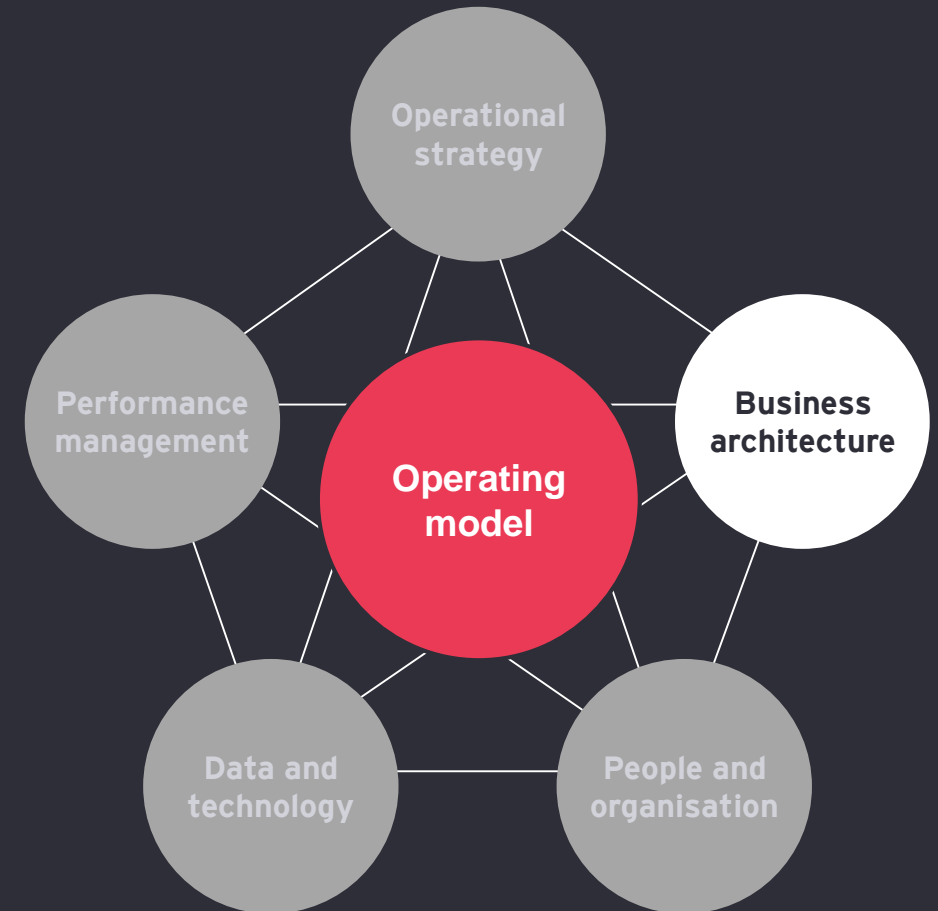
### Strategic objectives

Financial	Customers		Processes		Learning	
Generate superior and sustainable profitability	Relevant and profitable portfolio	Scale the customer experience	Optimize the supplier management model (Profitability x supplier)		Make innovation profitable	Scaling human capital management model
Maximize value generation	Guarantee agreed service levels (Cost of serving)		High performance teams	Cost efficient technology	Market knowledge model	Internationalize the business model

## Business architecture

A business discipline that describes what the business does and how it must operate to achieve the business vision and strategy.

- Definition of the capabilities required to meet business objectives.
- Integrated end-to-end architecture providing **efficient and effective operations**.
- Strategic decision making aligned to strategy and focused on delivering value.



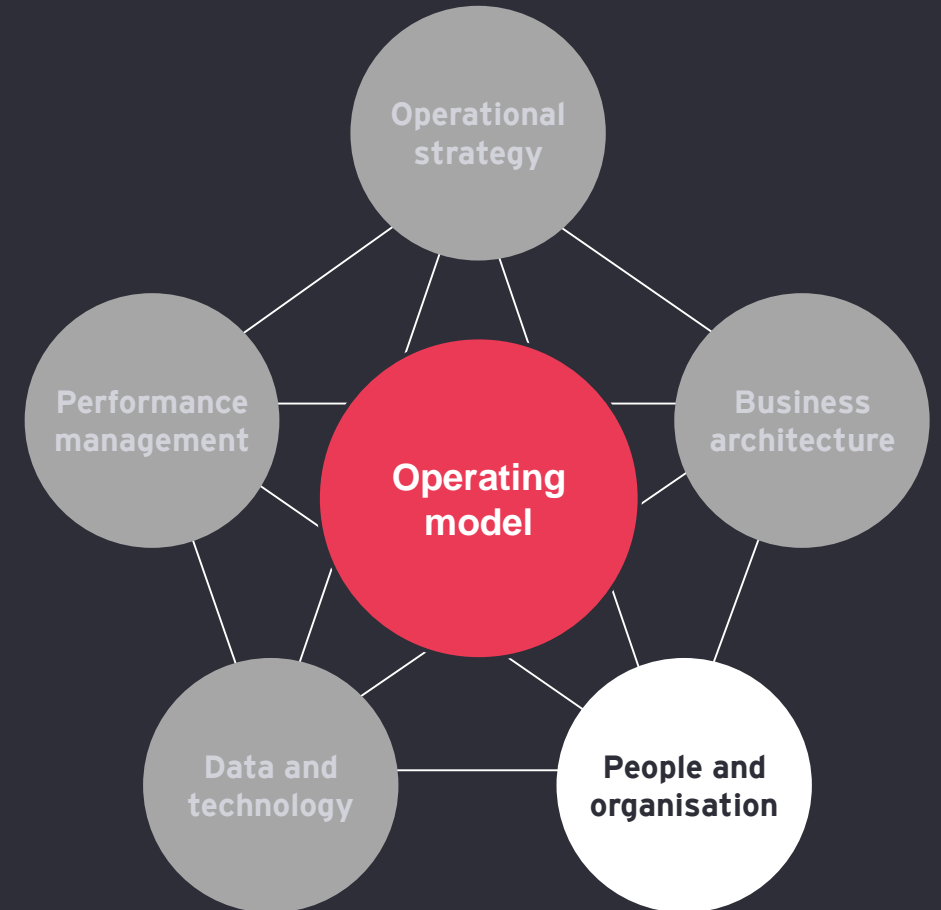
## Business architecture



## People and organisation

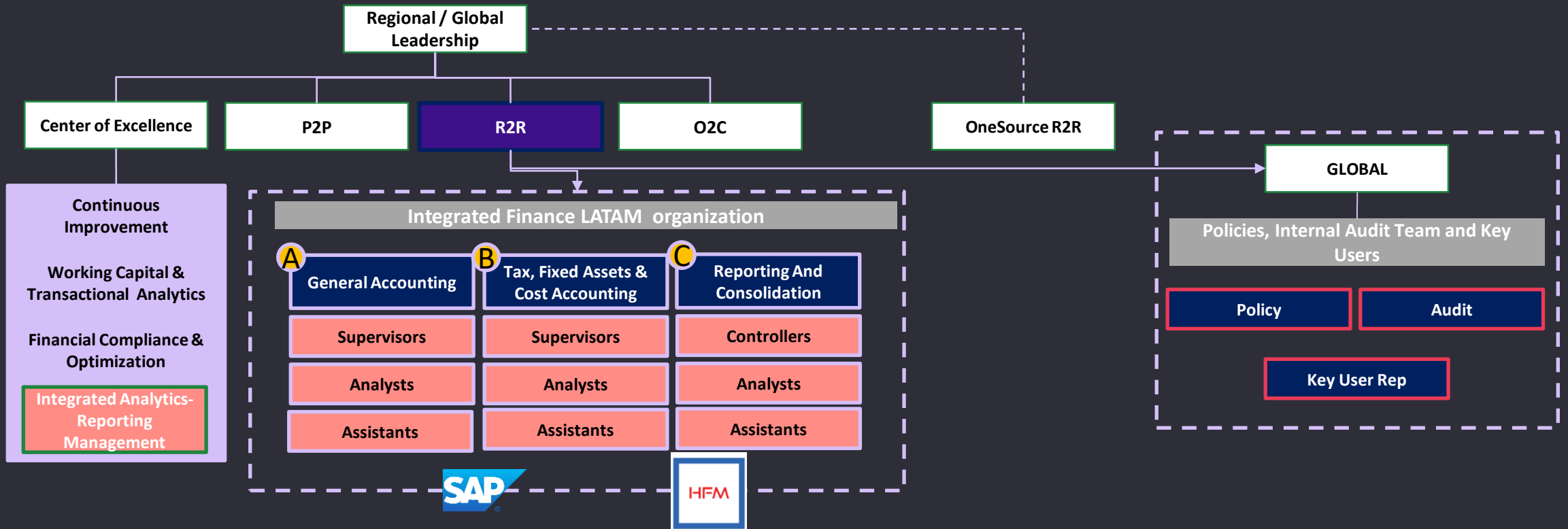
Definition of the necessary capabilities of people to fulfil the roles, functions and responsibilities established in the organisational structure.

- Strengthening **skills and capabilities** oriented to agile methodologies and digital solutions.
- Autonomous and multi-functional teams anchored in customer journeys, products and services.



# Operating model - Dimensions

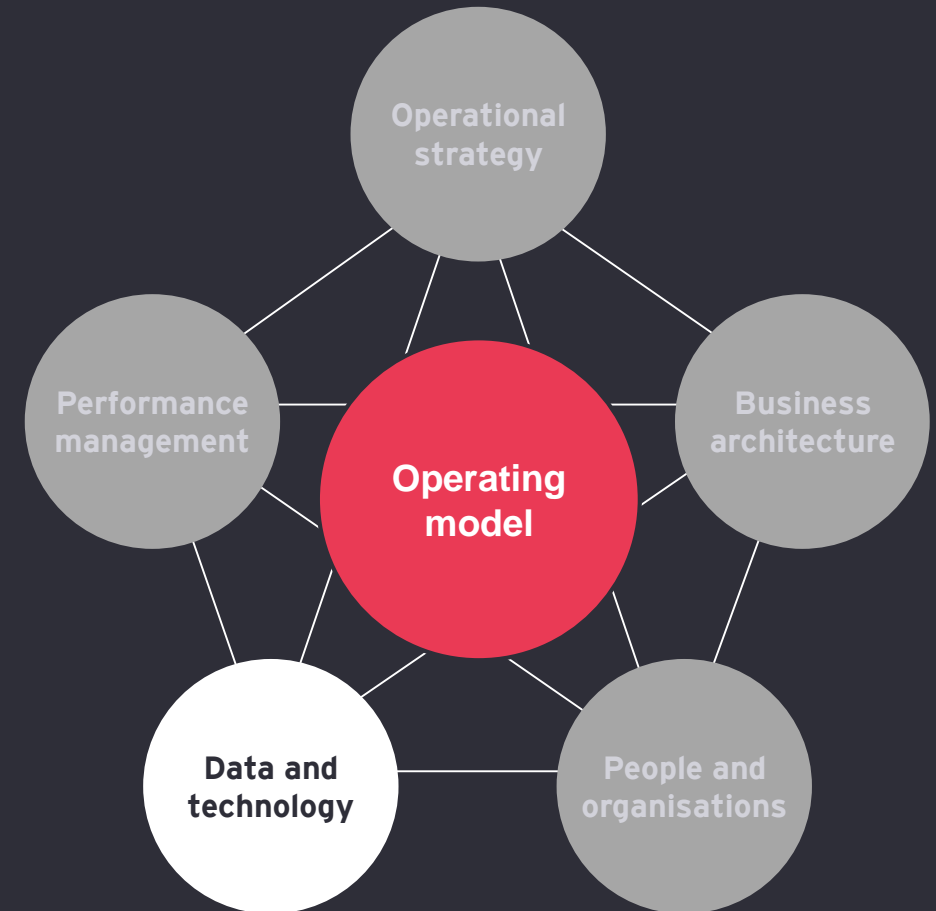
## People and organisation



## Data and technology

Define the technology and data that will facilitate the delivery of the Target Operating Model using information with enhanced integration and real-time information.






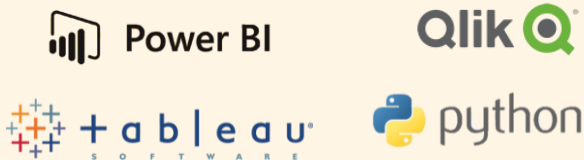

- Client relationship management tools to track and manage relationships
- Portfolio reporting system to collect and analyse portfolio company and underlying fund data





# Operating model - Dimensions

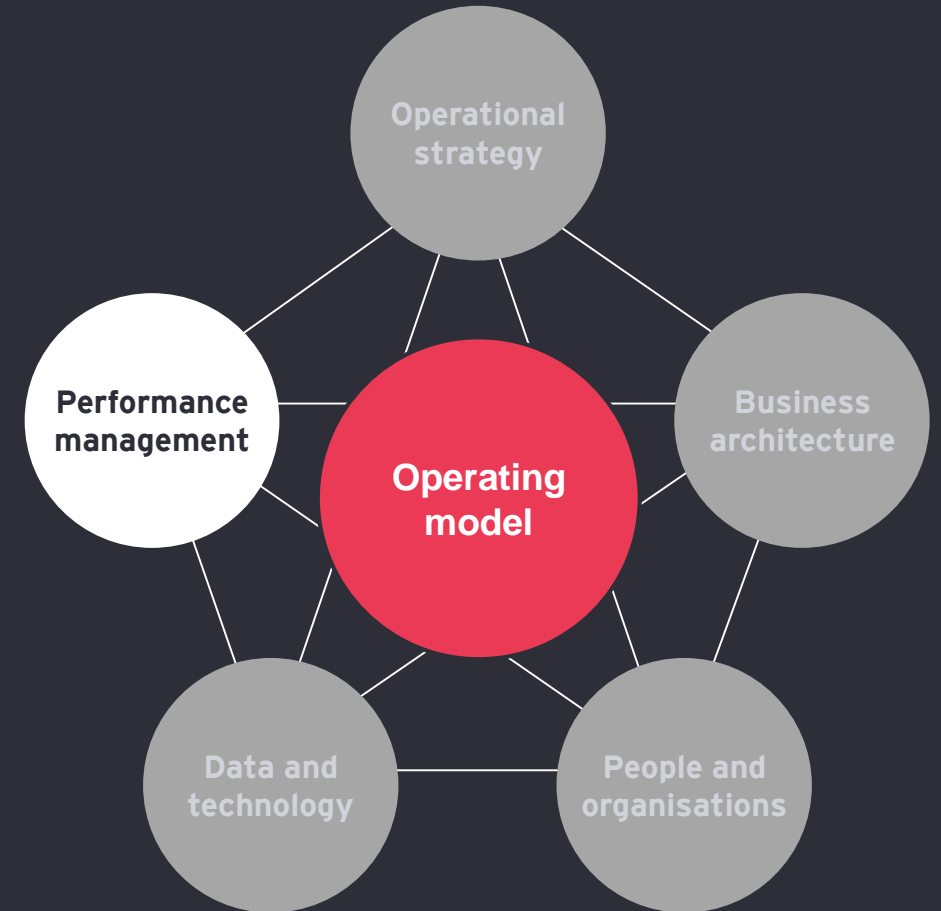
## Data and technology

Applications		Technological Benefits
Others		<ul style="list-style-type: none"> <li>Reduces information reprocessing time</li> <li>Provides control and monitoring of the process.</li> <li>Improves the user experience and interaction through the process, allowing a better understanding of the activities to be executed.</li> </ul>
ERP		<ul style="list-style-type: none"> <li>Reduces report generation and creation time and allows for quick decision making.</li> <li>Allows to have control over the closing dates for the reception of new financial requests, avoiding delays in the final processing.</li> <li>Improves the approval process, escalating requests to the appropriate parties, generating alerts and follow-up.</li> </ul>
Conciliation 		<ul style="list-style-type: none"> <li>Reduces manual activities and reconciliation generation time.</li> <li>Accelerates the analysis of reports and quickly identifies possible errors and discrepancies in accounting, banking and financial processes. And generates traceability and process control.</li> </ul>
Big Data, Analytics, Reports 		<ul style="list-style-type: none"> <li>Improves decision making for the company and the creation of strategic objectives through Big Data.</li> <li>Reduces manual activities for the creation of monthly reports.</li> <li>Understanding the needs of users, customers and business areas.</li> </ul>
Collaboration Tools		<ul style="list-style-type: none"> <li>Synchronizes the activities of the process in which different areas are involved, giving greater control in response times and execution of financial tasks assigned, in order to achieve the objectives of the company and meet the defined dates.</li> </ul>

## Performance management

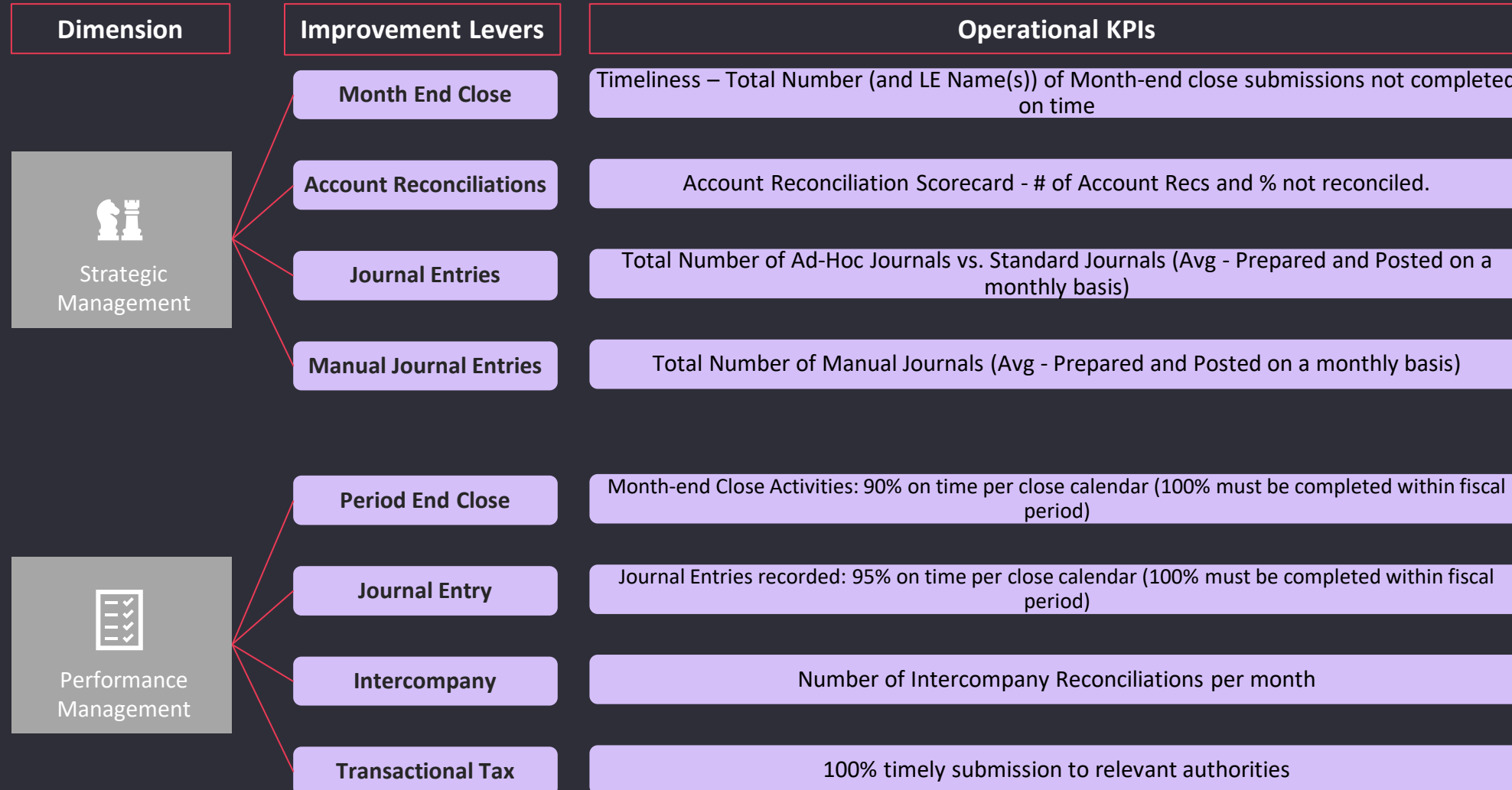
Establishing performance metrics in financial and qualitative terms to measure and evaluate the operating model

- Develop a business analytics platform to measure performance performance
- Establish a set of real-time KPIs across all processes



# Modelo operativo - Dimensiones

## Desempeño del rendimiento



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# WHY REDESIGN THE OPERATING MODEL?

## Target Operating Model (TOM)

- Future state of an operational model
- Planning and implementation of initiatives, programmes and projects
- Transformation roadmap

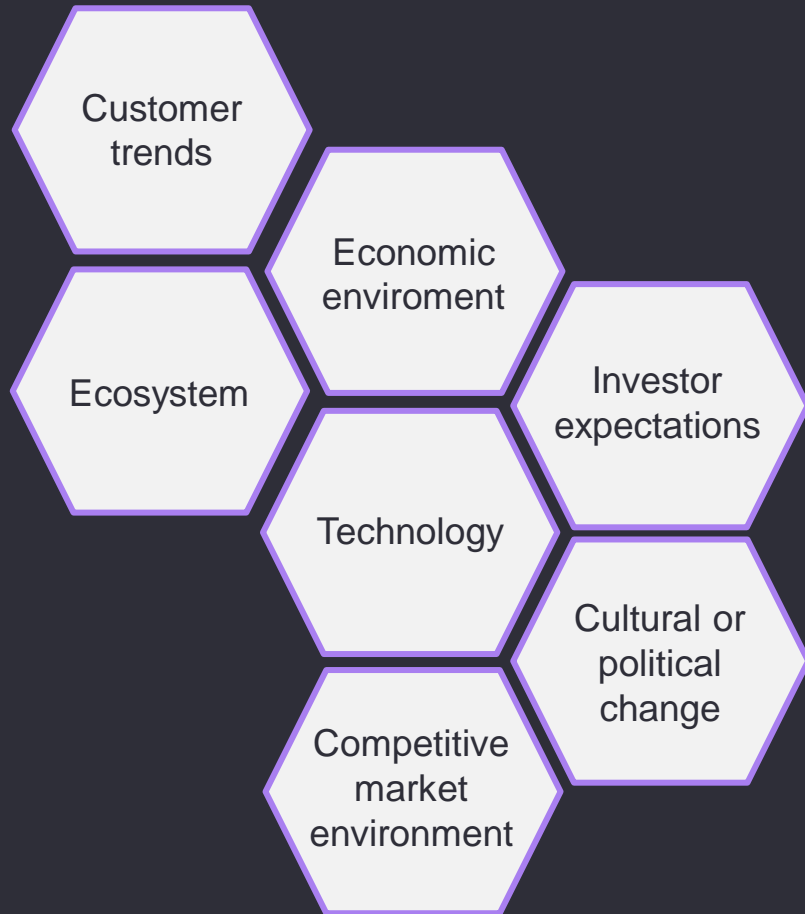


## Benefits

- ✓ Increase revenues and profits
- ✓ Improve customer experience
- ✓ Reduce operational risks
- ✓ Improve control and oversight over the business
- ✓ Reduce operational costs
- ✓ Improve data quality and timeliness
- ✓ Correct role assignment and effective training planning

# WHY REDESIGN THE OPERATING MODEL?

## External drivers



## Internal drivers



# | Adding **value** to the operating model



Design an operating model that is aligned with the customer's lifestyle (Customer Journey)



Use tools such as Design Thinking. Service design is a human-centred approach



Decision-making based on data analysis



Create a mindset of empathy. Companies need to create a culture that values empathy



# It's time to work together!

## GROUP CHALLENGE "Added value".



In groups of 3 to 6 people you will have to deepen the operational and business model for one of the member companies.

**Deadline: Thursday, 19<sup>th</sup> may**

**For detailed instructions, please refer to the ConnectAmericas Academy.**

Q & A

# THANKS!

## See you next Tuesday



Please access the following link and give us your feedback on today's class:

<https://forms.office.com/r/Da8w1qevmB>

Your opinion is very important to us