

Driving Business Success with IT Strategies and Digital Transformation

Leadership in the Digital Transformation Journey

Aligning Technology Strategy with Business Goals

Developing Comprehensive IT Roadmaps

The Role of Cloud Computing and Cybersecurity

Managing and Integrating Enterprise Systems

Implementing ERP Solutions and Data-Driven Strategies



We may be the biggest company you've *never* heard of...

Marmon Holdings

- 100% Owned by Berkshire Hathaway
- \$12B Annual Revenue
- 30,000 Global Team Members
- 150+ Autonomous Businesses
- Organized into 12 Groups

Marmon's Foodservice Group

- 10 World-Class Brands
- \$750m Revenue
- 2,000 Employees
- 24 global locations
- 70% of Revenue from North America vs. Global



Medical



Water



Foodservice Technologies



Retail Solutions



Transportation Products



Rail & Leasing



Electrical



Plumbing & Refrigeration



Metal Services



Industrial Products



Crane Services



Scott Fetzer / Specialty Products

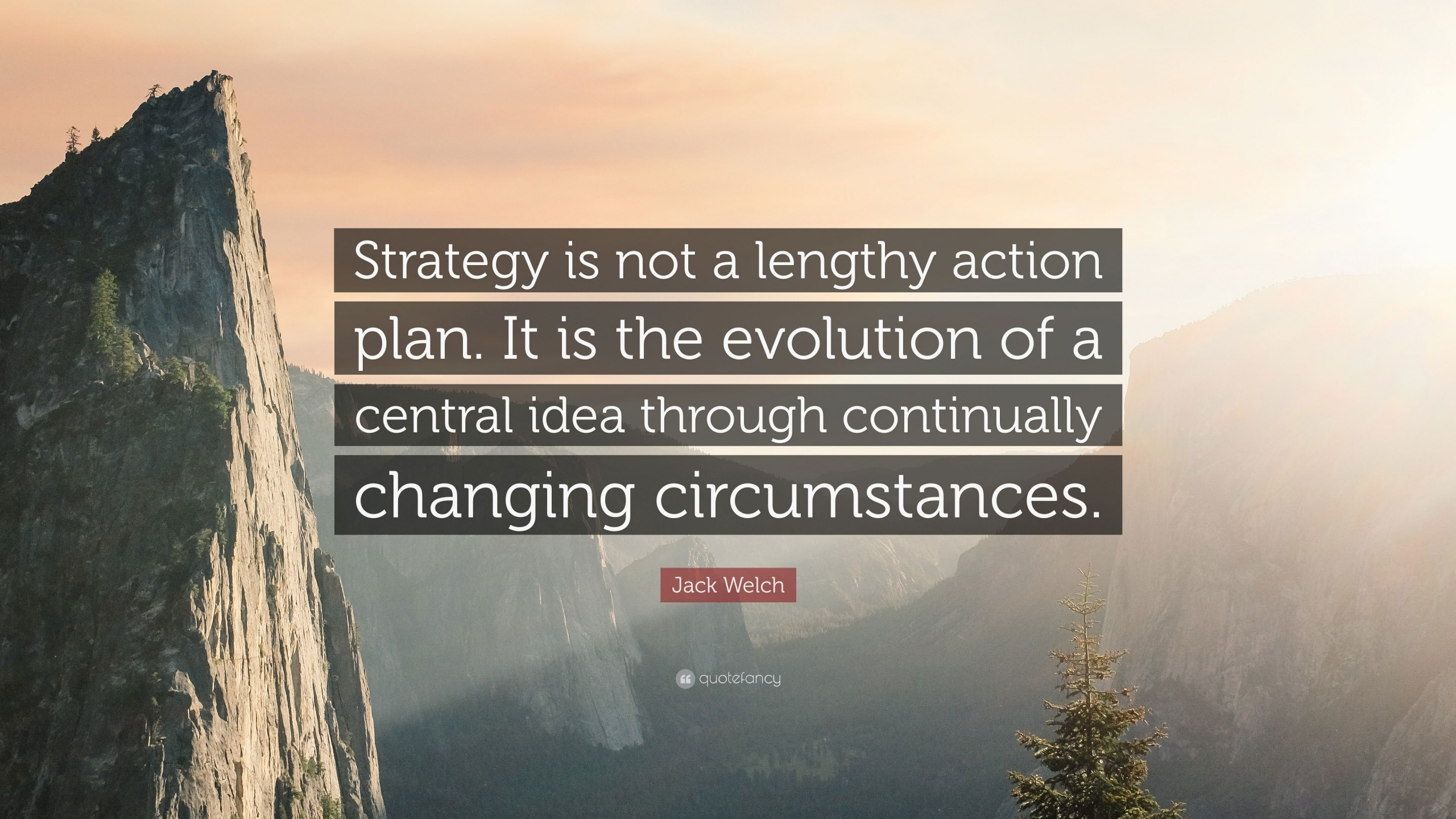
With Every Silver Lining, There is a Cloud

*Here I Come,
to Save the Day!*



- 1 year old organization with a 100 year history
- Siloed IT teams without leadership
- A corporate culture that hates IT
- More shadow IT than real IT
- “What’s an IT budget?”
- 18 obsolete ERPs with dozens of bolt-on’s
- 14 Active Directory domains
- 16 e-mail systems (including on-premise)
- 35 different anti-virus platforms
- 46 different PDF writers
- Daily security incidents
- \$1m+ license compliance issues
- No standards, no governance

Dogs and cats living together, total anarchy!



Strategy is not a lengthy action plan. It is the evolution of a central idea through continually changing circumstances.

Jack Welch

quote fancy



Culturally, Marmon companies like ours want to go fast, like our 1911 Indy 500 champion – the Wasp.

They want the future now and don't understand how the technology works and what it takes to support their dream.

So I had to design a new IT organization to run at the speed of business.

Aligning Technology Strategy with Business Goals

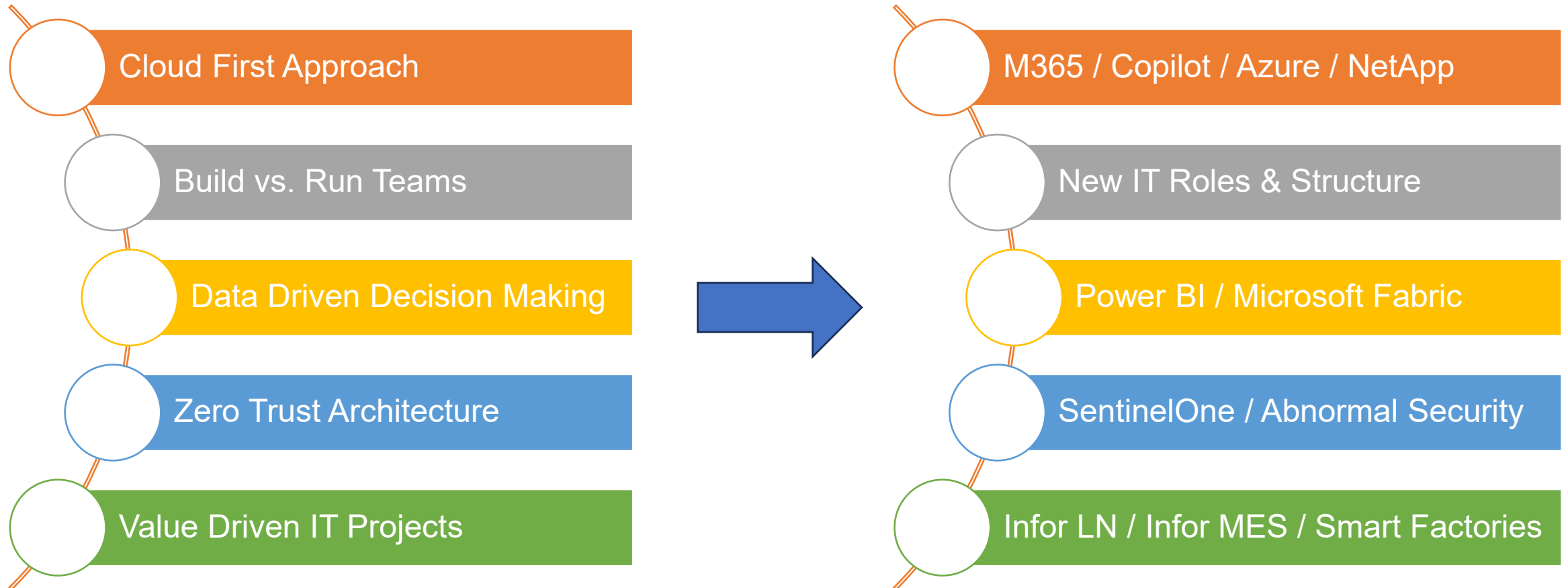


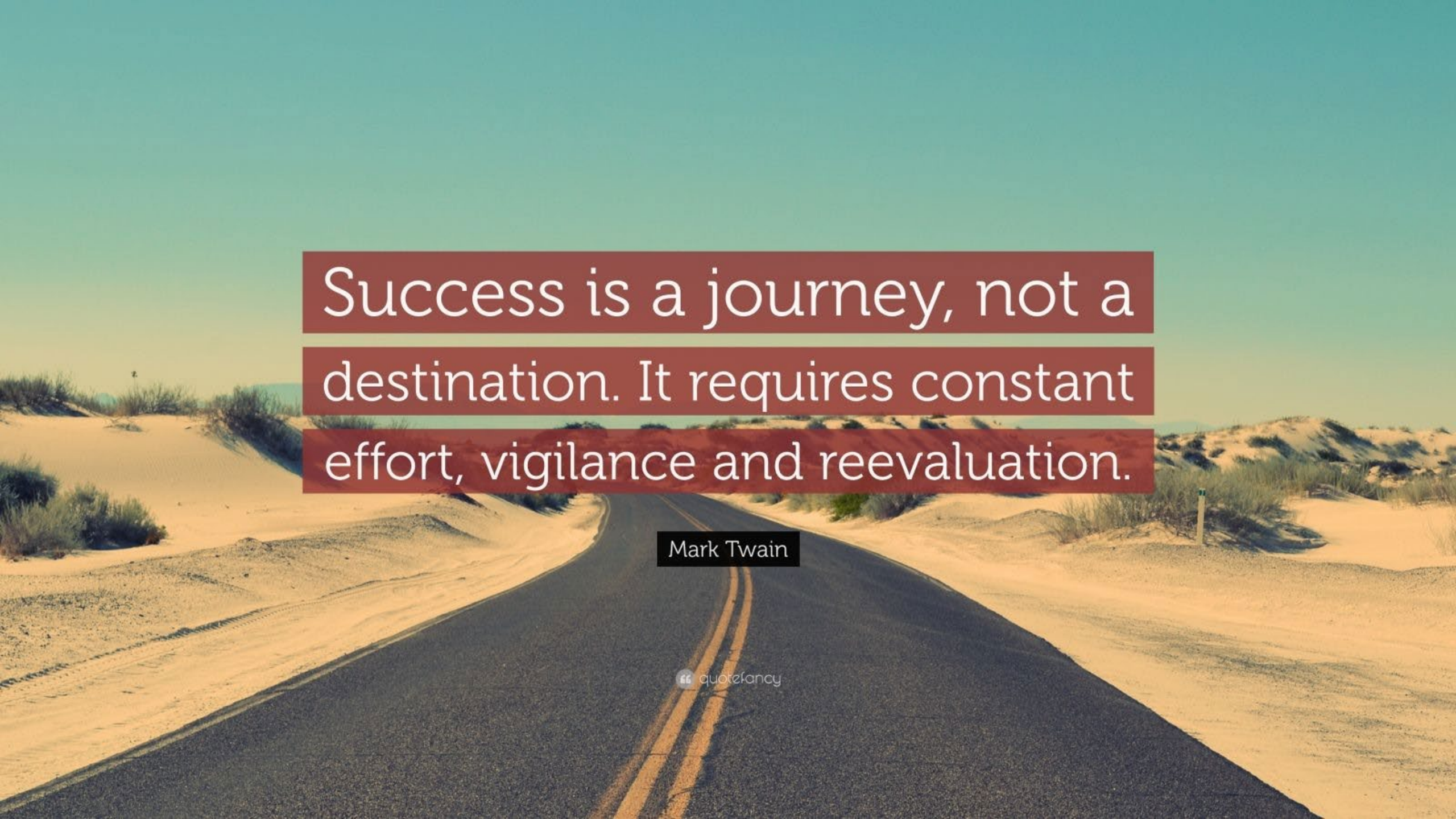
Instead of building an IT strategy in a vacuum, I focused on building the new IT operating model using the vision and language of the rest of the organization

| INVEST, LISTEN, AND GROW | EMPOWER ETHICAL ENTREPRENEURIAL LEADERS | DRIVE OPERATIONAL EXCELLENCE | LEVERAGE OUR SIZE AND SCALE | CHAMPION OUR PEOPLE |
|--|--|--|--|--|
| <ul style="list-style-type: none">• Gains insights• Sets strategic direction• Innovates to win | <ul style="list-style-type: none">• Models high ethical standards• Instills ownership• Makes superior business decisions | <ul style="list-style-type: none">• Drives continuous improvements• Manages with discipline• Delivers on commitments | <ul style="list-style-type: none">• Applies an enterprise mindset• Openly shares knowledge• Leverages technology | <ul style="list-style-type: none">• Builds trust• Grows talent• Fosters an inclusive culture |

Our old ways of doing IT were not going to get us to where we want to be

We had to rethink **EVERYTHING** and build a roadmap we could afford





Success is a journey, not a destination. It requires constant effort, vigilance and reevaluation.

Mark Twain

Where do
YOU
want to go?



The strategic initiative aimed at unifying disparate systems, brands, and digital infrastructure across the Foodservice group into a cohesive, scalable, and secure enterprise platform to support the business vision of One Marmon Foodservice Technologies (OneMFT) and accelerate the pace of change to drive sustainable profitable growth

- Operate as a unified enterprise
- Improve security and operational efficiency
- Enhance customer experience and analytics
- Enable scalable growth and future acquisitions

IT Strategy & Roadmap

Be model IT team acting as the trusted business partner of Marmon Foodservice Technologies management and staff providing innovative, value-added and cost effective, global technology solutions to internal and external customers alike.

Strategic Initiatives

- 1 Drive IT shared service model to better leverage existing IT staff and systems
- 2 Optimize IT portfolio to address critical business needs
- 3 Strengthen focus on providing value-added products and services to MFT customers

Enablers

- IT Staff Reorganization and Cross Training
- Infrastructure & Application Standardization
- Microsoft M365 (Office & Operating System Standardization)
- OneMFT Business Systems (North American ERP)
- Qlik Business Intelligence Platform
- Information Security for DFS & Software Development Teams

Tailwinds:

- Marmon Foodservices Sector restructuring is driving changes in business and system requirements
- Recognition that technology can be a strategic enabler for the sector and Marmon Holdings as a whole
- Increase in software driven products and IOT functionality require a better understanding of corporate IT systems
- General acceptance of lean/outsourcing/shared services models in other areas of the business

Potential Risks / Unknowns:

- Impact of COVID-19
- Future Marmon Holdings IT Strategy and Projects

Headwinds:

- Historically low investment in IT systems (high technical debt)
- MFT operating performance and cost controls limiting IT spend in Coronavirus transition
- Poor understanding of IT costs and cost drivers
- Limited investment in training and development of IT staff
- Challenging search environment to find new talent
- Cultural change for IT and business unit staff not accustomed to IT shared service
- Increasing business requirements from MFT business reorganization (IT changes are 6 months behind structural change)

Key Projects:

Infrastructure Standardization & Risk Management

- Global SD-WAN Network & Bandwidth Increases
- OneMFT Active Directory and SCCM Environment
- Microsoft Enterprise Agreement & License Compliance
- O365 Email Consolidation (marmonfoodservice.com)
- O365 Tenant Consolidation with MHI
- Window 10 Standardization and Hardware Refresh
- Server 2019 Upgrades & Hardware Standardization
- Microsoft M365 License & Security Upgrades
- Common ITSM Service Desk Platform
- KnowBe4 Phishing Tests & User Training
- Azure Cloud Backup and Disaster Recovery (2021)

OneMFT Business Systems

- Business Process Documentation & Standardization
- North American ERP Selection (2020)
- North American ERP Implementation (2021)
- EMEA ERP Consolidation to SAP / JDE
- APAC ERP Upgrade and Consolidation (2021)
- Support of Qlik Business Intelligence Infrastructure

Required Resources:

Infrastructure Investment

- TBD

Application Investment

- TBD

Human Capital

- TBD

Business Will Change and you Need to Change with It



“Change is the only constant in life. Ones ability to adapt to those changes will determine your success.”

**-- Benjamin Franklin
(Technology Pioneer)**



2018

Why have IT?

- A somewhat necessary evil
- Hyper fragmented and siloed
- Poor understanding of IT spend and needs



- Frequent security issues
- ERPs are rapidly aging
- Lack of vision and roadmap
- Years of neglect and lack of investment
- Rampant shadow IT

SHADOW IT

IT is Evil



2019

MFT is born



- Recognition that we need IT
- Qlik established as global ERP data consolidator



- Too many security issues
- Marmon HQ launches MPower



- Search for MFT VP of IT

HELP WANTED



2020

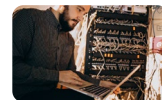
Year of COVID (WFH)



- Development of IT standards and start paying off "Technical Debt"



- ERP roadmap and application selection



2021

Harmonization Begins

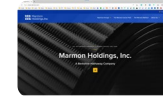
- New focus on security... IT-30



- Multiple facility consolidations
- O365 tenant consolidation (Prince Castle & Cornelius)



- Kick-off North American ERP consolidation



2022

ERP is Rolling

- O365 tenant consolidation (Marmon Link)
- Drive to improve security



- New leveraged spend agreement



- Heavy focus on ERP project Wave 1



2023

Infor & Microsoft

- Global Help Desk launches



- Microsoft Enterprise Agreement and upgrade to M365



- Phone system Consolidation

8x8

- O365 tenant consolidation (Angelo Po)
- ERP Wave 1A launches



We like IT, sorta..



2024

The Future is Here!

- Blackpoint Cyber providing 24/7 security monitoring



- ERP Wave 1B and Wave 2 Launch

- Consolidation of Business Analytics platforms



- Launch of Infor Rhythm eCommerce

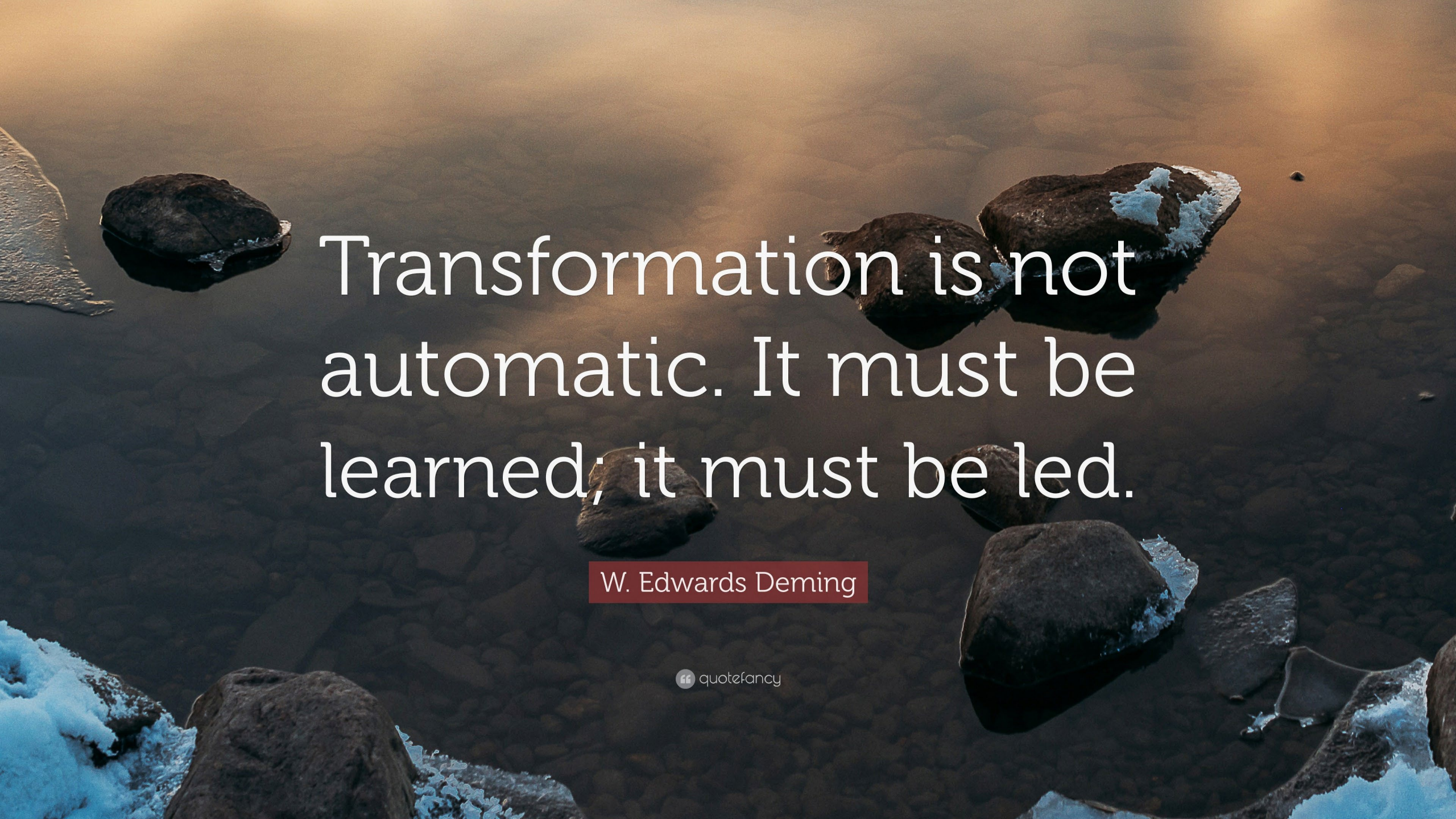


- Piloting several Artificial Intelligence (AI) projects including Microsoft Copilot



IT is shady

IT is MEH



Transformation is not automatic. It must be learned; it must be led.

W. Edwards Deming

A comprehensive and connected set of research to help you optimize and improve your core IT processes.

GOVERNANCE RISK & COMPLIANCE

EDM 01
IT Governance

EDM 02
Business Value Maximization

DSS 04
Business Continuity Management

APO 02
IT Strategy

EDM 03
APO 12
Risk Management

APO 04
IT Innovation Strategy

MEA 02
MEA 04
Internal Controls & Assurance

EDM 05
APO 08
Stakeholder Alignment & Management

MEA 03
Compliance Management

APO 01
IT Management & Policies

MEA 01
Performance Management

APO 11
Quality Management

STRATEGY & INNOVATION

PROJECT & PORTFOLIO MANAGEMENT

APO 05
BAI 01
IT Portfolio Management

BAI 11
Project Management

BAI 05
Organizational Change Management

BAI 08
Knowledge Management

APO 03
Enterprise Architecture

ENTERPRISE ARCHITECTURE

PEOPLE & LEADERSHIP

APO 07
Talent Management

ITRG 01
Leadership, Culture & Values

APO 01
IT Organizational Structure

APO 09
ITRG 02
Service Management

EXPONENTIAL ^{IT}

ITRG 04
Data Governance

APO 14
Data Management

APO 06
IT Financial Management

ITRG 03
IT Product Management

DATA & ARTIFICIAL INTELLIGENCE

APO 14
Data Strategy

ITRG 06
Data Development & Integration

EDM 04
Resource Optimization

APO 10
Vendor Portfolio Management

IT FINANCIAL & VENDOR MANAGEMENT

ITRG 05
AI Strategy

ITRG 07
Data Insights & Analytics

BAI 03
ITRG 09
Application Strategy

APO 10
Vendor Performance Management

SECURITY & PRIVACY

APO 13
Security & Privacy Strategy

DSS 06
ITRG 08
Privacy Program Management

DSS 05
Security Management

BAI 02
Requirements Gathering

APO 05
Application Portfolio Management

APPLICATIONS

INFRASTRUCTURE & OPERATIONS

ITRG 11
Infrastructure & Cloud Strategy

BAI 04
DSS 01
Operations Management

DSS 05
Security Operations

DSS 05
DSS 06
Identity & Access Management

BAI 03
BAI 07
Application Development & Delivery

BAI 03
Application Selection & Implementation

BAI 09
BAI 10
Asset & Configuration Management

BAI 06
BAI 07
Change & Release Management

BAI 04
DSS 01
Availability & Capacity Management

DSS 02
DSS 03
Incident & Problem Management

ITRG 12
Service Desk

ITRG 10
Application Maintenance

THE CIO PLAYBOOK

8 Secrets & 12 Steps to Systematically Achieve IT Excellence



| JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
|--|--|--|---|--|--|---|---|---|---|---|--|
| Understand & Own Your Mandate | Get the Basics Right | Build Technology Leaders | Prioritize Valuable Work | Don't Get Fired | Manage Vendors Based on Value | Provide World-Class Insight | Lead Technology Innovation | Build Board Confidence | Align & Execute Goals | Spend With Precision | Review, Align & Adjust |
| Measure Stakeholder Satisfaction ○ | Manage and Improve Core IT Processes ○ | Diagnose Your IT Staffing Issues ○ | Optimize Project Intake, Approval, and Prioritization △ | Build an IT Risk Management Program △ | Design an Enterprise Architecture Strategy △ | Understand Your Reporting & Analytics Needs ○ | Measure Digital Readiness ○ | Maximize IT Benefits Realization △ | Align CIO and CEO Expectations ○ | Benchmark Your IT Spend ○ | Gauge Your Exponential IT Readiness ○ |
| Review Your IT Strategy △ | Create a Clear IT Process Improvement Plan △ | Implement an IT Employee Development Plan △ | Rationalize Your Project Backlog □ | Develop Your Information Security Strategy △ | Conduct the Application Portfolio Diagnostic ○ | Review Your Data Strategy △ | Understand Your Industry Trends △ | Build a Regular CEO IT Update Package □ | Align IT Strategy With Organizational Goals △ | Design a Data-Driven Workforce Plan △ | Learn About Next Year's CIO Priorities △ |
| Set and Manage IT Performance □ | Establish High-Value IT Performance Dashboards and Metrics □ | Train Your Existing and Emerging IT Leaders □ | Improve Requirements Gathering □ | Train Your Cyber Workforce for Future Challenges □ | Rationalize the IT Application Portfolio △ | Establish Data Governance △ | Define Your Digital Business Strategy △ | Develop Your Boardroom Presentation □ | Build a Business-Aligned IT Strategy △ | Create a Transparent and Defensible IT Budget △ | Perform a Career Self-Assessment □ |
| Effectively Manage CxO Relations □ | | Train Your Managers on Management Fundamentals □ | Measure IT Project Value □ | Empower End Users With Security Awareness □ | Leverage the Rapid Application Selection Framework □ | Build Your Data Quality Program □ | Build a Comprehensive Business Case □ | Visualize Your IT Strategy △ | | | Build an IT Succession Plan □ |
| | | | Assure Your Project's Success □ | | Review and Negotiate Your Vendor Contracts □ | Build a Reporting and Analytics Strategy □ | | | | | |
| <p>Legend ○ Assessments & Diagnostics △ Strategy & Planning □ Implementation & Training</p> | | | | | | | | | | | |



Change is easy to propose,
hard to implement, and
especially hard to sustain.

Andy Hargreaves

Implementing ERP Solutions and Data-Driven Strategies

- Complicated **multi-language, multi-currency, multi-level account** structures affecting over 40 legal entities
- **A phased program** to replace more than 16 ERP global systems across 12 countries over a 5-6 year period
- **More than 1,000 users** (many of whom don't speak English)
- **150+ person project team** representing all functional areas and locations across multiple operating units
- **Business transformation project, NOT a technology project**
- Wherever possible, **we should use standard Infor best practices**, we are not re-creating old systems
- **Leveraging Infor Ecosystem** – more than just ERP, but Analytics, AI, eCommerce, Supply Chain & Logistics, Document Management, PLM, MES, WMS, Process Automation etc.



**Cloud Suite
Industrial Enterprise**



**MULTI FINANCIAL
SINGLE LOGISTICS
MULTI SITE OPS**



**MULTI MODE
MANUFACTURING
AND PLANNING**



**EMBEDDED, NETWORKED
ANALYTICS**



**DISTRIBUTION PLANNING
ADVANCED WAREHOUSING**



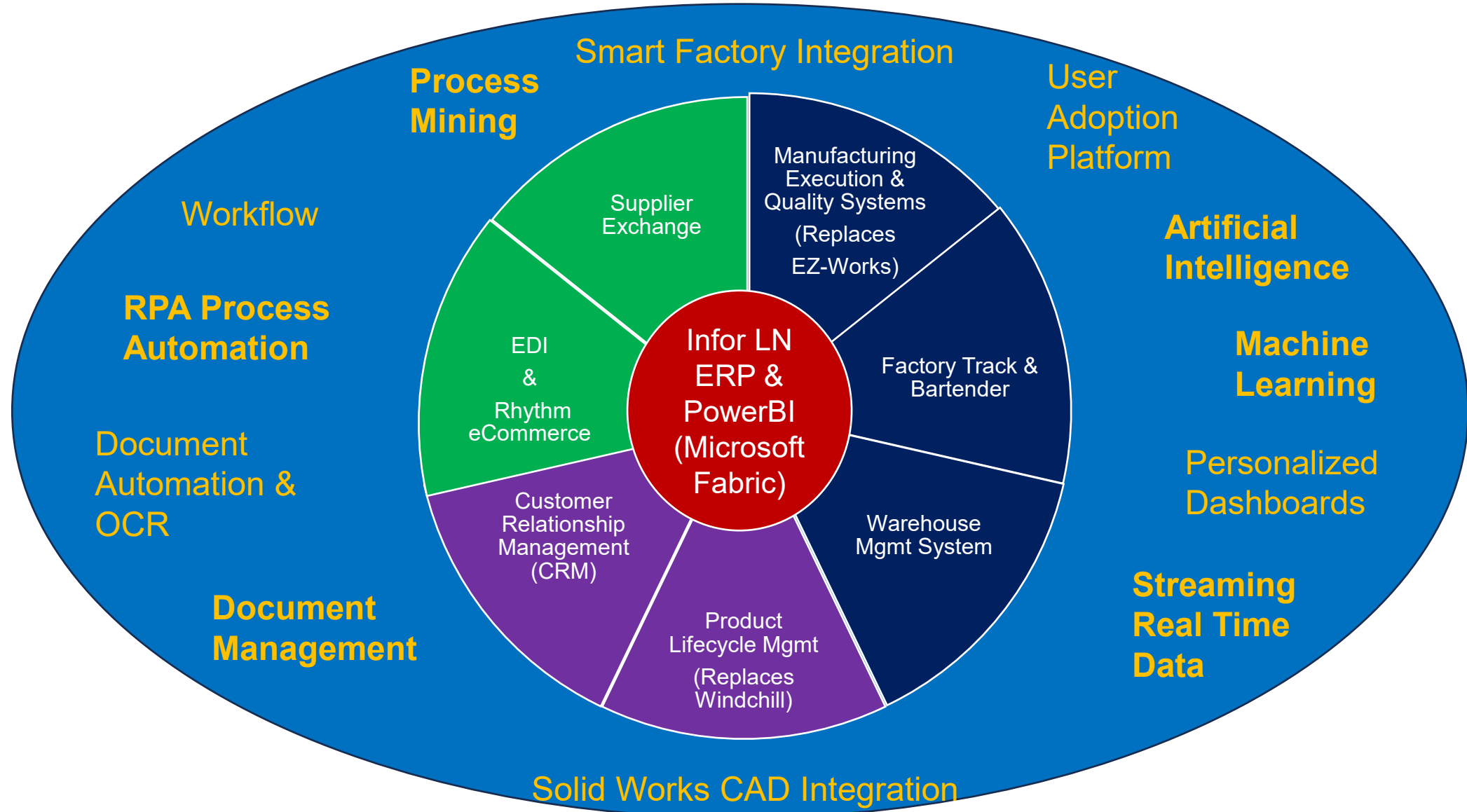
**ONE VIEW
CUSTOMERS
SUPPLIERS**



**ENHANCED, MODERN
SALES FRONT-END
CONFIGURATION**

The “Smart” Ecosystem

Optimizing Time to Value



Leveraging Infor LN and AI to Deliver Business Value



Microsoft
Copilot

Teams Premium

M365 Copilot



Microsoft Fabric

Microsoft Power
BI & PowerBI
Copilot

Microsoft
Machine
Learning



Infor “Smart” Ecosystem

Infor LN
Infor Velocity
Infor Value+
Infor Data Mesh



AI in Other
Applications

i.e. Abnormal
Security, Ninja
RMM and
FreshService

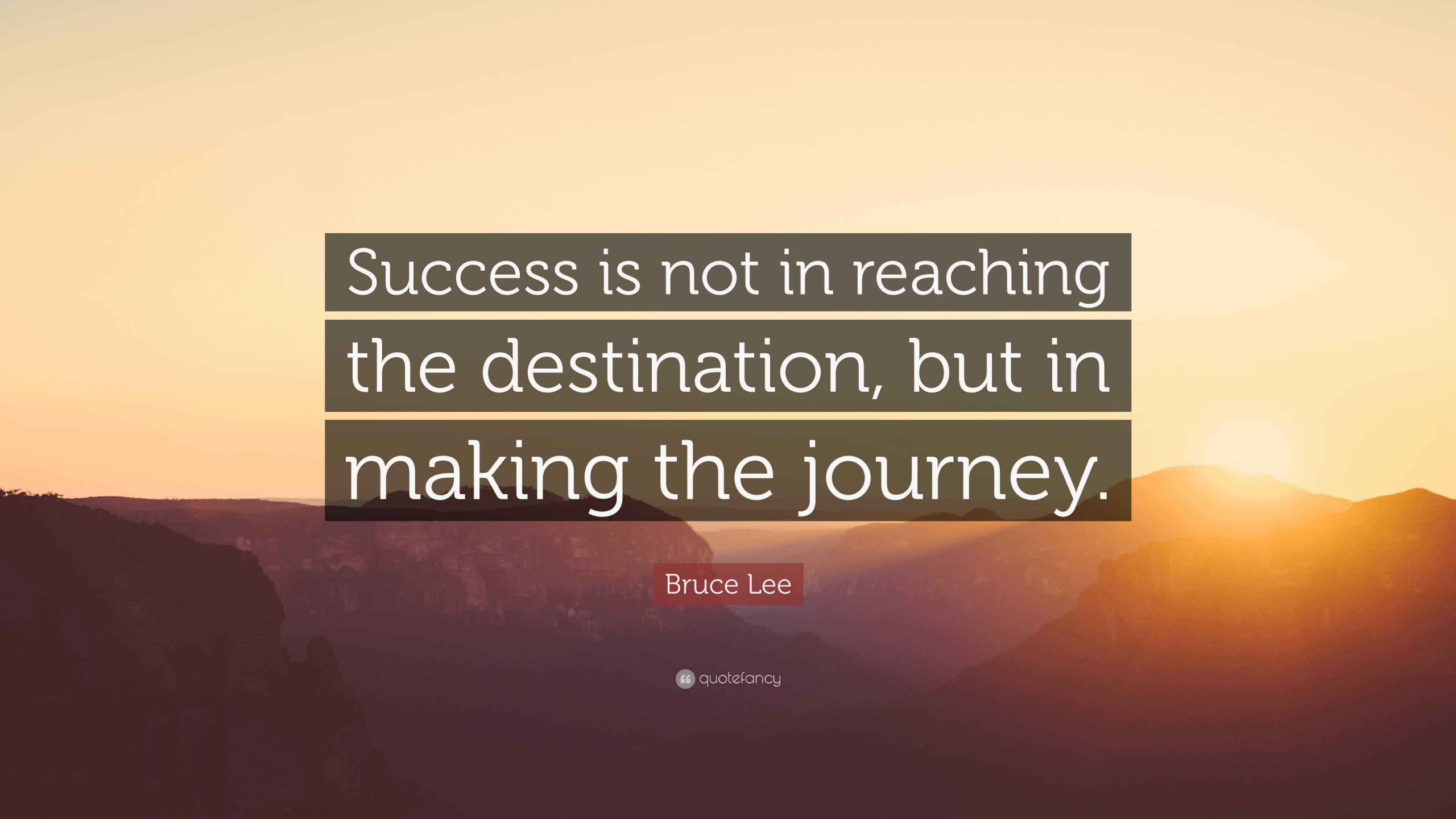


Specific Data
Science Use
Cases

i.e. Marmon Link
Manuals
Chatbot

Data – Strategy, Governance, Quality, Management

Artificial Intelligence / Machine Learning Strategy and Governance

A scenic landscape at sunset or sunrise with mountains and a bright sun. The sky is a warm orange and yellow, and the mountains are silhouetted against the light. The quote is centered in three dark grey boxes.

Success is not in reaching
the destination, but in
making the journey.

Bruce Lee

Lessons for Driving Business Success



Leadership in the Digital Transformation Journey

1. Your job is to lead, develop new leaders and delegate!
2. Commoditize low-value tasks to unlock bandwidth for innovation

Aligning Technology Strategy with Business Goals

3. Stakeholder Satisfaction is the key success metric!
4. Flexibility is key, the business will evolve with your strategy

Developing Comprehensive IT Roadmaps

5. Build a flexible roadmap – change is inevitable
6. All projects seem important, but are not - Ruthless prioritization!

The Role of Cloud Computing and Cybersecurity

7. Go to the cloud, but be smart avoid sprawl and spiraling costs
8. Bake security into everything you do, build defense in depth

Managing and Integrating Enterprise Systems

9. Move to the cloud and simplify the ecosystem – minimize integrations you must manage
10. Flexibility is critical, the world is constantly changing

Implementing ERP Solutions and Data-Driven Strategies

11. Avoid the big bang and look for synergies across platforms
12. It's all about the data – beginning, middle and end

ENJOY THE JOURNEY



 Jeff Roseman