



# Assist-To-Succeed (ATS) Consulting

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## Who Are We.....

Assist-To-Succeed (ATS) Consulting is a Not-For-Profit social enterprise and registered Charity established to provide management and consulting services to community organisations. We consult to organisations on general management, technology management and project management. Our services are provided predominantly on a pro bono basis. Our charity is a means for volunteer consultants to contribute their skill and knowledge for the benefit of our community.

- We volunteer our professional skills to assist charitable and non-profit organisations in achieving their own objectives effectively and efficiently.
- We mentor and enable the organisations to encourage capability development and self-sufficiency so they can be more effective in servicing our community.
- We provide the platform to reach out to the community of social services providers, and to volunteer consultants who are interested and are willing to respond to the call to contribute their skill and knowledge for the benefit of the community.

***We would like to acknowledge AMP Foundation for giving us a grant through the AMP Tomorrow’s Fund to support the establishment of ATS Consulting.***

<p style="text-align: center;"><b>Our Vision</b></p> <p>To enable charitable and non-profit organisations to operate more efficiently so they can be more effective in servicing our community.</p>	<p style="text-align: center;"><b>Our Mission</b></p> <ul style="list-style-type: none"> <li>• To volunteer our professional skills to assist relevant organisations in achieving their own objectives effectively and efficiently.</li> <li>• Mentor and encourage when required to encourage growth and self-sufficiency.</li> </ul>
<p style="text-align: center;"><b>Our Belief</b></p> <p>The community is stronger because of the services provided by charitable and non-profit organisations.</p>	<p style="text-align: center;"><b>Our Values</b></p> <ul style="list-style-type: none"> <li>• Society will benefit from our services.</li> <li>• We provide high quality professional mentoring.</li> <li>• We work as a team</li> <li>• We enjoy intellectually challenging work</li> <li>• We value our relationships with each other</li> <li>• We respect the confidentiality of the organisations we work with</li> </ul>

## Our Experience .....

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All our consultants have a proven track record in large change program delivery and business units management, plus specific strengths in one or more of the following areas:

- Strategy development and execution
- Change leadership and program management
- Operation management and governance
- Project management and governance

We draw on the expert skill from the most appropriate consultants to deliver agreed services to our customers. To enable us to deliver these services with the required skills, we have two groups of consultants in ATS:

**Active Consultants** are ATS members who are able to contribute their time during normal working hours to meet with, and deliver consulting services to our clients. These consultants are either in their retirement after a long-time successful career, or having their career break and are willing to dedicate their time for a worthwhile cause. The profiles of these consultants are attached.

**Support consultants** are ATS members who are unable to deliver direct consulting services to our clients, mainly due to their current work commitments and availability. They support the Active Consultants by contributing their professional knowledge through input/reviews to the consulting work, as well as providing management, administrative, and technical support to ATS Consulting.

## Our Service.....



We deliver our service as consultants and advisors to the client organisation rather than directly perform the operational roles for the client. Our goal is to develop and uplift the capability and maturity of the client organisation, including their people, strategy, process and governance.

Our services are broadly categorised in 3 areas:

1. Management consulting
2. Technology consulting
3. Project Delivery consulting

Category	Service Name	Service Description
Management Consulting	Strategic Planning and Alignment	<ul style="list-style-type: none"> <li>• Support the client to develop (or review) their organisation and business strategic plan, to align with their vision, mission, and strategic objectives.</li> <li>• Harmonise business strategic plan with organisation’s priority, resources, internal and external landscape outlook, and regulatory requirements.</li> <li>• Support the client in developing and establishing new businesses through business development, strengths alignment, and growth areas.</li> </ul>
	Business Architecture	<ul style="list-style-type: none"> <li>• Support the client to design (or review) business architecture, including functional and process grouping, to meet the current and future needs of the business and support the implementation of the business strategy.</li> <li>• Review alignment of business and IT system architecture to ensure they are compatible and will enable delivery of the required business outcome.</li> </ul>
	Organisational Development and Change Management	<ul style="list-style-type: none"> <li>• Support the client to design (or review) organisation structure and role/job definitions</li> <li>• Provide leadership coaching and mentoring</li> <li>• Assist in resource planning and capacity forecasting</li> <li>• Support the client in the planning, communication, and execution of organisational change.</li> </ul>
	Operations Quality Assurance	<ul style="list-style-type: none"> <li>• Support client in business process design</li> <li>• Conduct health check and risk assessment of business and operational processes</li> </ul>

## Our Service (cont'd.).....



Category	Service Name	Service Description
Technology Consulting	ICT (Information and Communication Technology) Strategy and Business/IT Alignment	<ul style="list-style-type: none"> <li>• Support the client to develop (or review) their ICT strategy to enable the client organisation to make the right decisions on their IT investment</li> <li>• Harmonise business and IT strategies and ensure the desired IT outcomes reflect and support the client's core business strategies and priorities.</li> <li>• Conduct feasibility study on initial concept of specific IT investment.</li> </ul>
	Governance and Control	<ul style="list-style-type: none"> <li>• Support the client to develop an organisational governance framework for the IT investment, which includes project investment and operational spend.</li> <li>• Provide active governance through participation in executive level IT Steering Committee (ITSC)</li> </ul>
	Process Maturity	<ul style="list-style-type: none"> <li>• Conduct health check, SWOT analysis, and risk assessment of the overall IT processes.</li> <li>• Provide practical assistance to clients to establish and/or strengthen IT process controls, resulting in an uplift in the maturity of their IT Operation.</li> </ul>
	Business Continuity Planning (BCP) / Disaster Recovery Planning (DRP)	<ul style="list-style-type: none"> <li>• Assist the client to identify and document business critical activities and IT systems and develop the appropriate BCP/DRP</li> </ul>
	Architecture	<ul style="list-style-type: none"> <li>• Support the client to design (or review) the IT system and infrastructure architecture to meet the current and future needs of the business and support the implementation of the ICT strategy.</li> </ul>
	Tender Management	<ul style="list-style-type: none"> <li>• Support the client in procurement of IT products and/or services, from preparation of RFI/P to evaluation and assessment of proposals, including technical review and investment analysis.</li> </ul>

## Our Service (cont'd.).....



Category	Service Name	Service Description
Project Delivery Consulting	Methodology Development	<ul style="list-style-type: none"><li>Develop (or review) the project management methodology and project delivery life cycle to meet the specific needs of the client, taking into consideration the client's organisation size, culture, and business goals.</li></ul>
	Project Management	<ul style="list-style-type: none"><li>Support the client's project managers through framework and template development, planning and review, and coaching, to strengthen the project management discipline and protect the IT investment.</li></ul>
	Project Governance	<ul style="list-style-type: none"><li>Provide active governance through participation in Project Control /Steering Group.</li></ul>
	Project Quality Assurance	<ul style="list-style-type: none"><li>Conduct health checks on projects as requested by the client and report the findings and recommendations to the Project Sponsor and Project Control /Steering Group.</li></ul>

# Consulting Services Examples



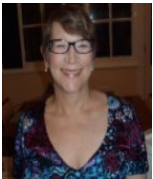



Examples	Description																	
1 – Strategy Development	<p>Provided advice and guidance to CEO and Executive Leadership team in their strategic planning cycle to unpack and allocate the growth targets (~\$20m) across focus areas and business divisions. Reviewed and recommended approach to manage the strategic execution to enhance effectiveness and increasing impact to the communities served.</p>																	
2 – Operational and Financial Sustainability	<p>Worked with CEO and CFO to identify and prioritise operational and financial areas. Threats to 'going concern' sustainability were investigated and recommendations for alleviation made in a report for the CEO and Board to consider. Assisted with risk register and treatment of behavioural issues. CEO management coaching.</p>	<table border="1"> <caption>Financial Sustainability Data</caption> <thead> <tr> <th>Year</th> <th>Income</th> <th>Expenses</th> <th>Net Profit/Loss</th> </tr> </thead> <tbody> <tr> <td>2019-20</td> <td>3905</td> <td>2532</td> <td>1373</td> </tr> <tr> <td>2018-19</td> <td>3421</td> <td>2642</td> <td>779</td> </tr> <tr> <td>2020 Budget</td> <td>3248</td> <td>2723</td> <td>525</td> </tr> </tbody> </table>	Year	Income	Expenses	Net Profit/Loss	2019-20	3905	2532	1373	2018-19	3421	2642	779	2020 Budget	3248	2723	525
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3 – Business Project Conception and RFP Process	<p>Supported customer in the strategic migration of infrastructure and applications to a hosted solution. Guided and assisted in the issued RFP, responses and selection of the final service provider. Guided and assisted in the implementation of the changed environment including re implementation of application modules.</p>																	
4 – Business capabilities and disciplines	<p>Giving advice and guidance in conceptualising Business processes review and introducing Business Intelligence and developing management dash board to plug gaps in loss making Business operation areas. Introducing commercial disciplines such as developing Business cases to justify investments to introduce new products and/or Systems.</p>																	
5 – Strategic Initiative	<p>Advice and support client's key strategic initiative (strategic investment in early learning centre) from concept to execution. ATS participates as a key member of the client's executive team. ATS is able to complement client executive team in areas of strategic thinking, commercial/contractual disciplines, governance and planning.</p>																	

# Consulting Services Examples (cont'd)

Examples	Description	
6 - Financial Management Ownership Assessment	Conducted a management review of the ownership of major financial decisions and processes. Provided a report on recommendations to support the organisation's growth strategy of 50% growth to the CEO. Conducted report briefing to CEO and Executive Leadership team.	
7 – Business and Systems Transformation	Supported client in developing and implementing their Core Business Transformation and Systems program. Scope included the replacement of the Customer Management System, Payroll and Staff Scheduling Systems (distribution and fulfilment), introduction of Risk and Problem management, integration with Business Intelligence, HR and Security systems. Advised on significant change management, including business processes, staff training, quality assurance, business operations, and project management.	
8 – Validation of Business and ICT Strategy Alignment	Conducted a review jointly with the customer on their business strategy and initiatives, and their ICT strategy and the 3-year plan. The purpose was to validate the extent of strategy alignment, and to make the necessary refinement of the ICT plan to ensure it would support implementation of the business strategy and initiatives.	
9 – IT Service Operations Improvement	Conducted a SWOT analysis jointly with the customer, using an IT Service Operations framework. Based on the results of SWOT analysis, and the organisation's needs and priorities, an implementation plan for improvements and strengthening of IT Service Operations was adopted and committed by the organisation. ATS continued to support the customer on the implementation of monitoring of the outcome.	
10 –Target state operating model	Guided and supported the customer to develop a target state operating model of their core business prior to issuing the RFP to acquire a new core system. The model provide s a comprehensive view of how the organisation will operate using the new system.	
11 – Project delivery and ICT Governance Framework	Recommended and supported the customer to Implement a 3-tier project delivery and ICT governance framework. All IT projects and services in the organisation are managed and governed consistently under this framework. ATS team continues to be a member of the steering committee.	



## The ATS Team

	<p><b>Chair of the Board / Management Consultant - Eric Yeung</b>, B.Sc. (Eng.), MBA</p> <ul style="list-style-type: none"> <li>• 40 years of experience in retailing banking / finance / technology industries</li> <li>• 20 years of senior program management and line management experience in one of the big four banks in Australia, in capacities of Divisional CIO, Head of Technology, and Program Director.</li> <li>• Experienced in strategy development and execution, running technology as a service, sourcing strategy and vendor management</li> </ul>
	<p><b>Vice-Chair of the Board / Management Consultant - Chun Cheung</b> M.Sc.(Hons), Post Graduate Dip. In Corporate Management, B.Economics (Hons)</p> <ul style="list-style-type: none"> <li>• 30 years of experience in retailing banking / finance / technology industries</li> <li>• 16 years of senior management (Head of level) experience in one of the big four banks in Australia</li> <li>• Experience in strategy development and strategy execution especially in retail banking/technology domains.</li> <li>• Strong change leadership capability with special interest in large program/business unit “start up” and “turn around” situations.</li> <li>• Other industry experience include telecommunications, software vendor and public services</li> </ul>
	<p><b>Secretary of the Board / Management Consultant - Helen Hughes</b> Master of Project Management, BA</p> <ul style="list-style-type: none"> <li>• 30 years of experience in retailing banking / finance / technology industries</li> <li>• 15 years experience in leading projects in one of the big four banks in Australia</li> <li>• Special interest in leading projects that traverse different companies, countries and team members’ cultures</li> <li>• In-depth working experience across the banking value chain including channel/distribution, products , back office operations, program delivery and IT development</li> </ul>
	<p><b>Treasurer of the Board - Henry Chung</b> BSc(Hons), CEng, CITP, MBCS</p> <ul style="list-style-type: none"> <li>• 35 years IT solution engineering experience in banking industry</li> <li>• 19 years in managerial positions, experienced in stakeholder management and vendor management.</li> <li>• Strong leadership capability in delivering project and business outcomes</li> <li>• In-depth working experience across system development and production support</li> <li>• Other industry experience include food and hospitality services.</li> </ul>
	<p><b>General Board Member - Tony Eid</b> B.Sc. (Computer Science), Executive MBA</p> <ul style="list-style-type: none"> <li>• 28 years of experience in Banking/ Wealth Management/finance /technology industries</li> <li>• 20 years of senior management experience in various size companies including large multinational , in capacities of Technology Chief Operating Officer, Head of Technology, Program Director, and Consultant</li> <li>• Experienced in strategy development, global Programme management, business management, vendor management and business consulting</li> </ul>
	<p><b>General Board Member - Narayan Rajagopalan</b> BSc., DCM</p> <ul style="list-style-type: none"> <li>• 36 years IT solution engineering experience including 26 years in banking industry.</li> <li>• Strong leadership capability in solutioning project and business outcomes</li> <li>• In-depth working experience across domain architecture, system development and support</li> <li>• Other industry experience include manufacturing and transport sectors.</li> </ul>

## The ATS Team (cont'd)

	<p><b>Management Consultant - Mukund Shah</b> Master of Business Management, Postgraduate Diploma in Computer Science, Bachelor of Electrical Engineering</p> <ul style="list-style-type: none"> <li>• 30 years of experience in retailing banking, Insurance &amp; technology industries</li> <li>• Experienced across the banking value chain including channel/distribution, products, back office operations, program delivery and IT development</li> <li>• Experienced in leading Change programs involving Mobile/Browser technologies and integration with multiple legacy business applications.</li> </ul>
	<p><b>Management Consultant - Anand Pradhan</b> B.E (Electronics and Telecommunications), PMI Certified from 2001 to 2009, ACS certification</p> <ul style="list-style-type: none"> <li>• 41 years of experience in Information Technology with global organization covering hardware, software, systems and implementation and projects</li> <li>• Business development executive responsible for cross country large projects for global IT services company.</li> <li>• Project executive on implementation of application and infrastructure projects supporting local government, and providing end to end systems (infrastructure and software) guidance and support to NSW utilities organisations .</li> <li>• Management committee member of Sydney based Indian Community organisation providing cultural support to the community.</li> </ul>
	<p><b>Management Consultant - Trina Sun</b> B.Econ, CPA</p> <ul style="list-style-type: none"> <li>• 18 years of experience in Information Technology with a global organization covering services, business transformation, and integration</li> <li>• International experience in large scale transformation programmes, including acquisitions and divestitures with cross-cultural teams</li> <li>• Strategy development, execution and programme management across technology and business</li> </ul>
	<p><b>Management Consultant - Peter Pearson</b> MEngSc BE(Hons) BSc DipFinMangt, DipBusMangt MIEAust CPEng(ret) CPA(ret) MACS Snr(ret)</p> <ul style="list-style-type: none"> <li>• 40 years of experience in IT, consulting, business management and program management.</li> <li>• 30 years of management and senior management experience including CIO, program director, head of consulting and management of large (100+) IT departments and software development groups</li> <li>• Industrial sectors include banking, insurance, software house management and telecommunications</li> </ul>