Education

Pennsylvania State University
BS Organizational Leadership
Dean's Honor Roll

Texas A&M
Dwight College of Engineering
Masters of Industrial Distribution
Dean's Honor Roll 4.0 GPAHonor
Roll 4.0 GPA

Certifications

Lean Expert
Certified by Resideo

Kaizen Certified Facilitator
Certified by Honeywell

Experience

- **25-years experience** in industrial distribution in a variety of complimentary building construction B2B verticals including HVAC, electrical and low voltage. Diverse background including sales, business development, marketing, and operations.

- **Operations & Supply Chain at ADI** for 8 years, leading global inventory, distribution centers, logistics, facilities, and indirect spend prior to moving into Transformation Role.

- Prior Role(s) in Resideo: SVP, COO, Vice President Global Operations, Vice President Americas Operations

Allie Copeland

**SVP, Chief
Transformation Officer**
ADI Global Distribution

https://www.linkedin.com/in/
allielehmann/

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Transformational Change:
/ˌtræns.fɔːrˈmeɪ.ʃən.əl/ /tʃeɪndʒ/

A complex radical shift reshaping the organization, overhauling processes, systems, structures, and culture.

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Transformation is the Bridge to **Enable** Strategy

WHAT

Strategy

Revenue growth

Cost reduction

Improved balance sheet

Translates the strategic vision "WHAT"

into actionable steps "HOW"

HOW

Desired culture

Leader enablement

People engagement

Executional certainty

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Elements of Transformation Drive Value

1 Process **OPTIMIZATION**

2 Customer **EXPERIENCE**

3 Data **UTILIZATION**

4 Cultural **SHIFT**

Value from Operations

Value from customers

Value from new systems

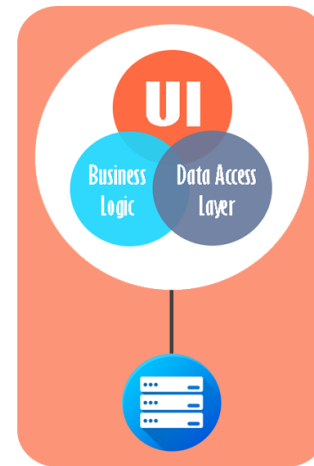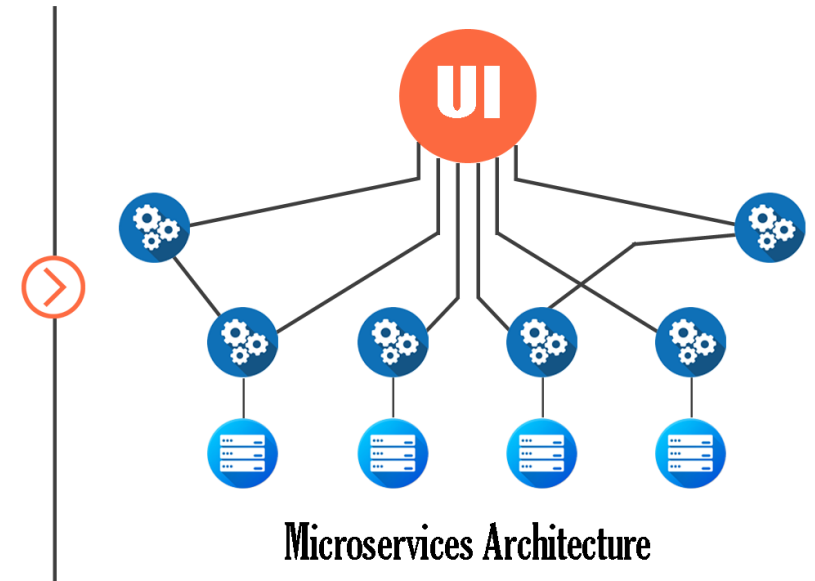SHIFT presented by mdm.com

① Process OPTIMIZATION

WHAT

Streamlining and **automating** business **processes** to improve efficiency and reduce costs. Leveraging technology to **capture** and **create value.**

HOW

Monolithic Architecture

Microservices Architecture

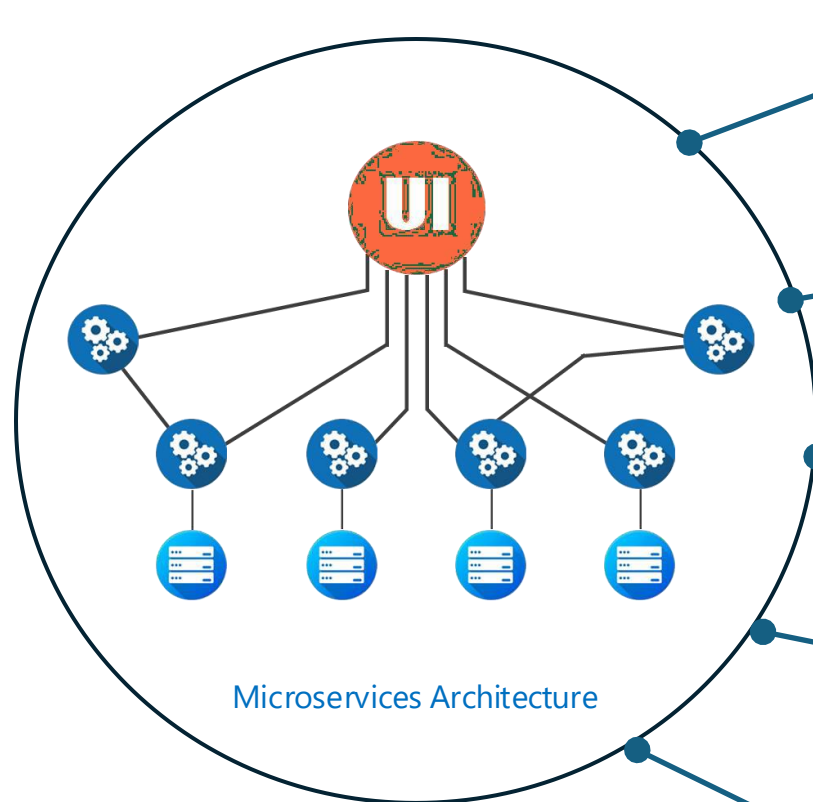**Evolving from Monolithic to Microservices Architecture**

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1 Process OPTIMIZATION
Why Microservices

1 **Development:** Easier to build & maintain applications; developers can work independently on components.

2 **Structure:** Autonomous cross-functional teams

3 **Scalability:** Each element can be scaled independently without downtime.

4 **Agility**: Flexibility implementing new technologies to solve business purposes

5 **Resiliency**: A failure in one Microservice does not affect other services

Microservices Architecture

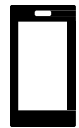SHIFT

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① Process OPTIMIZATION
Sample Wholesaler Omnichannel Microservices Architecture

USER INTERFACE LEVEL

Mobile Application Web Application Point of Sale

HTTPS queries

ROUTING LAYER

API gateway

| Service Discovery | Load Balancer | Security | Caching |

API Calls

MICROSERVICES

Product
- Pricing &Promotions
- PIM

Inventory
- Demand Planning

Customer
- Persona Management
- Notifications (SMS)

Ordering
- OMS
- WMS
- RMS

DATA STORAGE

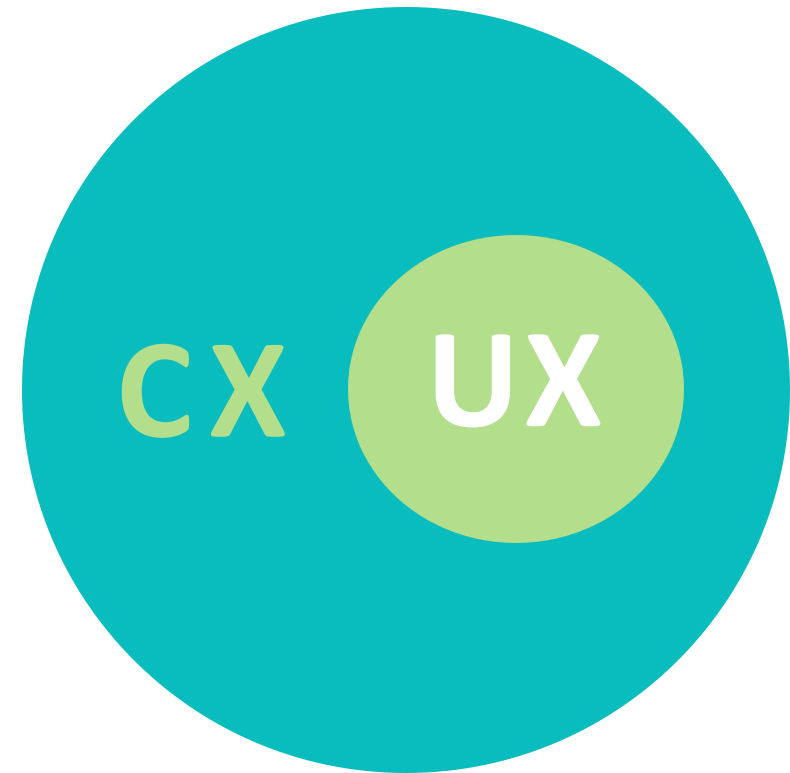MDM   ERP   HCM   CRM

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WHAT

Enhancing customer interactions through digital channels, **personalized** services, and **data-driven insights**.

HOW

CX **UX**

Digital Stack that supports lock step omnichannel CX & UX

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② Customer EXPERIENCE:
Choosing the right Digital Stack

Top 10 Digital CX Tools

- Frontend Experience Platforms
- CRM Platforms
- Customer Journey Management Software
- Customer Feedback Management Tools
- Social Media Tools
- Customer Experience Management Platforms
- Customer Engagement Platforms
- Helpdesk Platforms
- Personalization Platforms
- Post-Purchase Platforms

Data Integration
- Seamless flow of customer data for a holistic view
- Avoid silos from the start

Business Case
- Clear scope & case
- Don't overengineer
- Look for tools that support your business model & experience

Emphasize Agility
- Low code / no code options
- Microservices v. Customizations

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3 Data **UTILIZATION**

WHAT

Using data analytics to make **informed decisions** and **drive strategic** initiatives

HOW

Data Consistency
Data Quality
Operational Efficiency
Compliance & Governance

Master Data Management (MDM)

WHAT

Encouraging a culture of **continuous learning, agility,** and **adaptability** to embrace change.

HOW

- **Core Values**
- **Clear Vision**
- **Engage Leadership**
- **Communicate Transparently**
- **Empower Team Members**
- **Align Systems and Processes**

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Key Takeaways

1 Transformation is a **complex radical shift** in an organization designed to capture & **create value**

2 **Evolve** your system architecture from monolith to **microservices** to support a more **agile** future-proof optimization of processes.

3 Digital Stacks should support a combined **omnichannel UX and CX** measured through **unified data driven analytics**

4 Align the transformation to **Cultural & Ethical Foundations** to effectively lead change

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