



OPTIMAL CUSTOMIZATION:

**LEVERAGING ELITE BUSINESS  
UNDERSTANDING AND  
TECHNICAL CAPABILITIES  
TO UNLOCK OPERATIONAL  
IMPROVEMENT**

A PE INSIGHT BY:

**trajectory**

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## Introduction

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Niche businesses face a unique set of challenges. To optimize operational efficiency, they require tailored solutions catered to their specific needs.

According to studies, the more transformations a company takes, the greater its chances for success. But less than one-third of respondents in a [McKinsey survey](#) said their companies' transformations were successful. Similarly, out of the 89% of board directors who reported having embedded digital in all of their business growth strategies, [Gartner found](#) that only 35% had achieved or were on track to achieving their digital transformation goals.

One-size-fits-all technology implementations fall short in addressing unique requirements, as they overlook the nuances that make each business distinct. By prioritizing customized solutions that are right-sized, organizations can harness the power of technology tailored specifically to their needs. This ensures the seamless integration of every aspect of their operations.

It is in this context that Trajectory's approach to "optimal customization for unique businesses" becomes a game changer, paving the way for success in today's competitive landscape.

In this white paper, we discuss how to unlock operational improvement via optimal customization.

Key considerations include emphasizing a business-first mindset, understanding the unique aspects of the business for optimal customization, and building for scalability.

The white paper will also present Trajectory's client-centric approach to digital transformation, as illustrated by the KNOX case study, as well as discuss what we see on the horizon for tailored customization.

## The Challenges Unique Businesses Face

Every company has unique aspects to its business model, and going deep into what makes them different is necessary to find points of leverage to unlock operational efficiency.

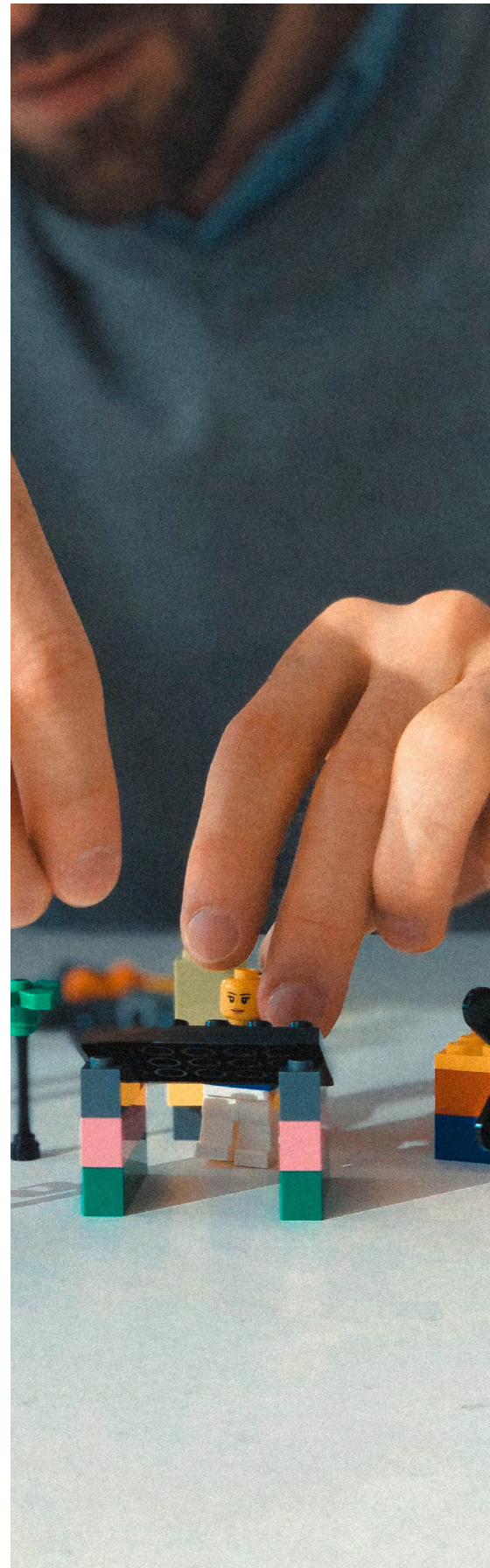
Companies often face significant challenges when seeking technology solutions that cater to their specific needs. [Gartner reports](#) that according to 75% of R&D leaders, less than half of the innovation projects they have attempted to implement have been successfully adopted.

One major hurdle is the scarcity of readily available, off-the-shelf products that align with specific operational requirements. This can lead to a time-consuming and resource-intensive search for a compatible solution, resulting in potential delays in implementation and increased costs.

Another challenge is the risk of over-customizing, creating a solution that is too narrowly focused, limiting the business's ability to adapt to future changes in their industry or target customers.

Over-customized solutions can also lead to increased maintenance and support costs, as they may require frequent updates and troubleshooting by specialized experts.

To overcome these obstacles, niche businesses must strike a balance between customization and flexibility, allowing for seamless integration and scalable growth while maintaining operational efficiency.



# BUSINESS-FIRST, NOT TECHNOLOGY-FIRST

The success of digital transformation projects in niche businesses hinges on the ability to balance two distinct approaches: the business-first mindset and the technology-first mindset.

Understanding the differences between the two can help organizations make informed decisions when implementing customized solutions for their unique operational challenges.

The business-first mindset prioritizes the organization's strategic objectives and operational nuances, ensuring that the technology solutions implemented are tailored to meet the specific needs of the business. This approach emphasizes the importance of deeply understanding the customer's industry, market dynamics, and internal processes to develop a solution that aligns with their goals, optimizes efficiency, and supports long-term growth.

A business-first mindset enables the organization to stay competitive, agile, and responsive to market shifts by leveraging technology as an enabler of its core business strategies.

Conversely, the technology-first mindset focuses on the latest technological advancements and trends, often promoting the adoption of cutting-edge solutions without considering their alignment with the business's unique objectives and operational requirements.

While this approach may lead to the implementation of innovative features and capabilities, it can also result in decreased operational efficiency and unforeseen costs if the solutions are not customized to the organization's specific needs. Emphasizing technology over business strategy in digital transformation projects may lead to a less adaptable and scalable system, ultimately hindering business growth.

Technology for technology's sake doesn't benefit anyone. It has to fit into how people work to achieve desired results.

Niche businesses must carefully assess their unique operational requirements and adopt a balanced approach that combines the best of both mindsets.

By focusing on operational efficiency, customization, and implementation, organizations can develop tailored solutions that drive sustainable growth, enhance customer experiences, and maintain a competitive edge in their respective markets.



## UNDERSTANDING WHAT MAKES A BUSINESS UNIQUE

For true operational improvement, it is not possible to go “an inch deep and a mile wide.” Instead, the best approach is to uncover the unique aspects of a company’s business model.

Optimal customization refers to the process of adapting technology solutions to meet the unique needs of a business without compromising its ability to adapt to future changes or incurring excessive costs. For niche businesses, achieving this balance between customization and flexibility is critical to ensuring seamless technology integration with existing processes and infrastructure.

To attain optimal customization, businesses should prioritize understanding their specific operational requirements and align them with relevant technological capabilities. This involves conducting in-depth analyses of their industry, market dynamics, and internal processes to identify the areas where technology can have the most significant impact.

- Comprehensive business analysis:** Assess various aspects of the business, including operations, marketing, finance, and customer service. Analyze existing work processes, workflows, and challenges to pinpoint areas that can benefit from technology enhancement. Tools like value stream mapping can help visualize process flow, where bottlenecks are occurring, and which manual tasks can be automated through technology.
- Market and competitive analysis:** Conduct a competitive analysis to understand where the business stands versus its peers. Research industry trends and market demands to identify unmet customer needs, gaps in offerings, or potential areas of differentiation that technology can provide.
- Customer feedback and persona development:** Gather direct feedback from customers to

understand their preferences, pain points, and expectations. Tools like interviews, surveys, focus groups, and content analysis can help with data collection. Create detailed customer personas for each market segment to understand customers on a deeper level. This is fundamental to designing user-centered digital solutions.

- Technological landscape assessment:** Stay current on industry-related emerging technologies, such as artificial intelligence (AI) and the Internet of Things (IoT). Understand their potential alignment with operational processes, keeping in mind their capacity for integration, cost effectiveness, and scalability.

By doing all of the above, organizations can design solutions that cater to their present and future needs, leading to a more agile, scalable system that promotes long-term growth and competitiveness. Ultimately, optimal customization enables niche businesses to leverage technology effectively.

# BUILDING FOR SCALE

Whether a digital transformation initiative will succeed or fail hinges on one primary factor: scalability.

There are several reasons why scalability should be a top priority in the development of customized solutions for niche businesses.

- **Rapid evolution of markets, technologies, and industries:** New competitors, technologies, and customer expectations are emerging at a rapid pace. What works today may no longer be enough in a few years. Technology initiatives may become obsolete shortly after implementation. A scalable solution allows niche businesses to quickly adapt to changes and capitalize on new opportunities, ensuring their sustained success and relevance in the market.
- **Expanding operational requirements:** Business growth necessitates solutions with the capacity to accommodate increased workloads,

data volumes, or user demands. By building for scalability from the start, organizations can avoid the inefficiencies and frustration associated with constant system overhauls and upgrades, ultimately improving their long-term operational efficiency and customer satisfaction.

- **Mounting technology costs:** Scaling for growth can be prohibitively costly if the technology foundation is not designed for it. Solutions built to scale eliminate the need for massive reprogramming when the business experiences growth. This translates to significant cost savings in the long run.
- **Increased service interruptions due to unreliability of solutions:** Scalable systems are often architected with fault tolerance and redundancy in mind. By incorporating scalability into the design

process, organizations can prevent disruptions to their operations, maintaining business as usual and keeping customers happy.

- **Increasingly competitive landscape:** Customized solutions that are scalable can rapidly respond to market shifts and opportunities, giving organizations the advantage they need to edge out their peers. Scalable systems encourage innovation. They enable organizations to introduce new products, services, or features, keeping them at the forefront of customer demands and expectations.

Building for scale ensures the system can handle increasing demands, adapt to changes in the market or industry, and accommodate the growth of the company without requiring significant overhauls or modifications.

This was unfortunately the case with one Trajectory client. KNOX Rapid Access Solutions attempted implementation with another provider before approaching us.

As you will find in the case study below, we go beyond technology implementation by considering the company's future, not just the project plan.

We create processes and automation that work beyond go-live. With KNOX, we succeeded where the other provider did not.

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## Essential Elements for Digital Transformation Projects

Trajectory's approach to digital transformation focuses on the unique aspects of each company. To ensure the digital transformation initiative is well-planned, effectively executed, and aligned with the company's goals and needs, we apply the following key elements—or guiding principles—to each project.

### **PROVIDE CROSS-DISCIPLINARY INSIGHTS**

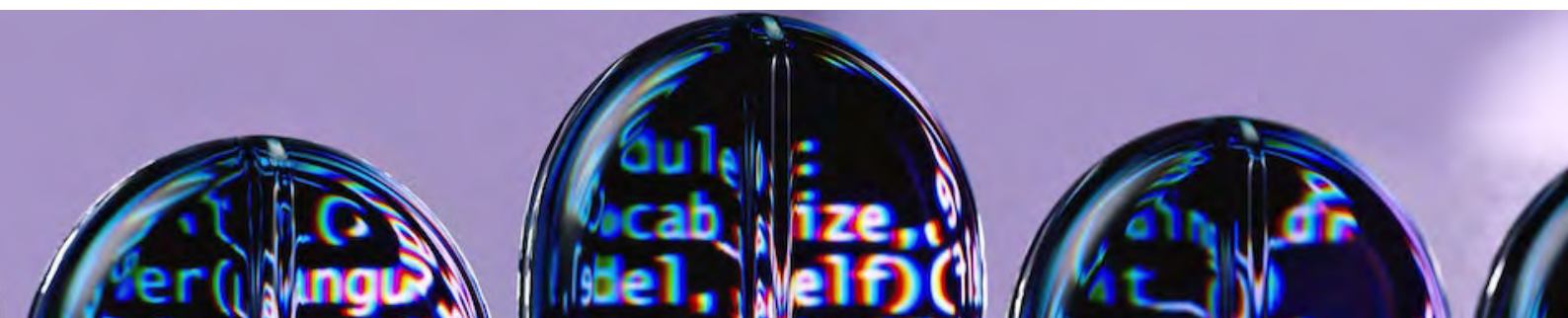
Digital transformation is a multidimensional undertaking. We recognize that successful transformation requires a holistic approach that considers various aspects of the business, including understanding how different departments and teams interact, identifying potential bottlenecks, and recognizing opportunities for collaboration.

By integrating knowledge, perspectives, and expertise from Trajectory's in-house team of experts, we ensure that the digital solutions we introduce not only improve individual processes but also contribute to the organization's overall efficiency.

### **UNDERSTAND THE BUSINESS**

Before starting any digital transformation project, we make sure to thoroughly understand the industry the client operates in, including the specific nuances that make their operations unique. Every investment is different, even in the same industry. It takes work upfront to understand what businesses do and how they do it.

We study the company's goals, workflows, challenges, and existing technology landscape—this understanding informs the entire digital transformation strategy. By aligning technology initiatives with the client's core business objectives, we ensure that every solution implemented directly addresses their pain points.





## **COLLABORATE EFFECTIVELY: CLIENT-CONSULTANT PARTNERSHIP**

We bring expertise and experience to the table, but we also acknowledge that our clients possess valuable knowledge about their systems and environments that we can never have without their help. We make it a point to establish an active dialogue between ourselves and our clients, where both parties are free to ask questions, seek clarifications, and discuss potential strategies.

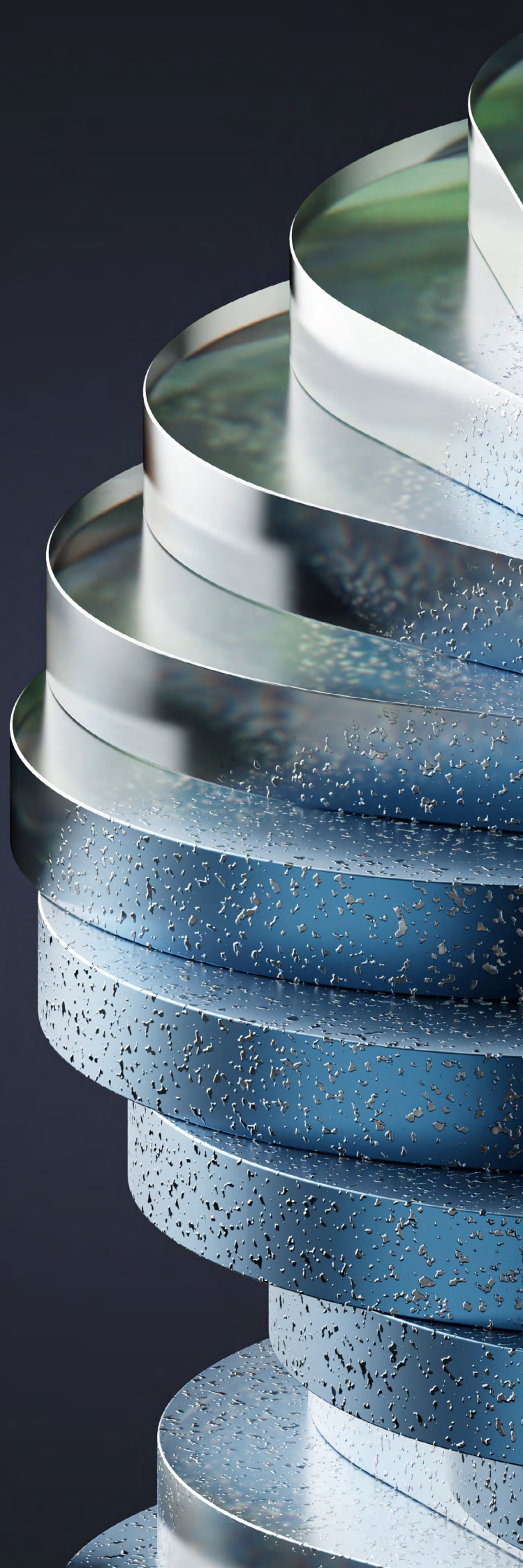
Making sure that feedback flows in both directions fosters an atmosphere of trust, flexibility in strategy, continuous learning, and long-term partnership.

To get everyone on the same page, we define milestones and performance indicators to measure project performance and conduct regular check-ins to identify any deviations from the project plan. This helps facilitate timely adjustments.

## **FIT TECHNOLOGY TO BUSINESS NEEDS**

Rather than allowing technology to drive the transformation, we tailor technology to the specific needs of the business. This involves carefully selecting and customizing technology solutions to align with the pain points and improvement goals we've identified in the early stages.

We leverage technology as an enabler rather than an end in itself. This enables us to ensure that the solutions we implement seamlessly integrate with existing processes and facilitate smoother operations.



**IT ALWAYS SEEMS  
IMPOSSIBLE  
UNTIL IT'S DONE.**



# CASE STUDY: KNOX'S DIGITAL TRANSFORMATION

Trajectory, in collaboration with digital services firm West Monroe, successfully helped KNOX Rapid Access Solutions with a full digital transformation of its ERP system.

KNOX, a manufacturer of rapid access solutions for first responders, had previously worked with another consulting company, but the results were lacking in terms of business understanding, NetSuite solution know-how, and project management abilities (specifically, timeline and budget management). So they pivoted and began working with Trajectory and West Monroe.

The KNOX-Trajectory/West Monroe project included implementing NetSuite and creating better workflow processes and technical solutions, in turn resulting in less overhead, workload, and system downtime. The project met timelines and stayed within scope, thanks to close communication and thorough discovery.

KNOX's ERP needs were complex. For example, their business model was predominantly make-to-order. Meaning, products must be tailored to the customer's location and regulatory compliance needs. Customer returns management was also very specific. Order return and product dismantling workflows varied depending on the type of product being returned and customer agreement information.

In the end, the project was a success, thanks to the Trajectory and West Monroe teams' preparation before beginning development work. The solutions were designed for the unique aspects of KNOX's business, and the functionality was crafted with an eye toward scalability.



**“A KEY PROJECT SUCCESS FACTOR WAS THE THOROUGH USER ACCEPTANCE TESTING PROCESS. WE TESTED EVERY POSSIBLE BUSINESS SCENARIO, EVEN CORNER CASES, TO ENSURE THERE WERE NO SURPRISES UPON GO-LIVE. WE ALSO CONDUCTED NUMEROUS DEMONSTRATIONS FOR ALL RELEVANT STAKEHOLDERS DURING THE USER ACCEPTANCE TESTING (UAT) PHASE TO ENSURE THE KNOX TEAM UNDERSTOOD THE CAPABILITIES OF THE NEW SOLUTION AND HOW TO TEST THE SOLUTION CORRECTLY.”**

Ryan Fish  
Senior Manager  
West Monroe

## **STARTING WITH AN EXPERIENCED CONSULTING TEAM AND DISCOVERY WORK**

Trajectory and West Monroe consultants came with a wide range of cross-functional experience across industries. They worked to thoroughly understand KNOX's business before providing a solution. By examining the existing deliverables created by the previous consulting firm and utilizing what was already built and effective, they avoided the need for rework while promoting progress on the project.

Additionally, Trajectory and West Monroe designed a detailed workflow process that aligned with KNOX's requirements and stakeholders before starting any development work. This helped to build confidence and reduce scope creep later on, streamlining development.

**“TRAJECTORY AND WEST MONROE’S CONSULTANTS EARNED THE TRUST OF OUR STAKEHOLDERS VERY QUICKLY. THEY PICKED UP WHERE THE PREVIOUS FIRM LEFT OFF AND LEVERAGED AREAS THAT MET KNOX’S REQUIREMENTS TO MINIMIZE REWORK AND DELIVER COST SAVINGS.”**



Mark Bradbury  
Director of IT  
The Knox Company

## **ADDRESSING KEY CHALLENGES WITH CUSTOM SOLUTIONS**

KNOX had specific areas where they needed tailored functionality given their industry and customers. Trajectory and West Monroe saw an opportunity to leverage automation and customization in these areas, driving operational improvement and enhancing employee experience.

In one scenario, Trajectory's development team boosted KNOX's distribution sales order process by creating a custom process that allows KNOX products from various jurisdictions to be included in a single sales order. This has significantly reduced the order management overhead for KNOX's operations teams.

Trajectory and West Monroe also collaborated with KNOX's finance teams to develop an automated settlement process for orders within a set tolerance, which substantially reduced the daily workload for KNOX's account receivables team.

Finally, the improved reporting functionality of NetSuite has benefited KNOX's manufacturing supervisors, who can now track productivity and quality on an individual level, thanks to the powerful reporting and search functionality of NetSuite.

## **BUILDING FOR THE FUTURE OF KNOX**

Oftentimes, consultants are brought in on a project basis and do not consider the long-term needs of the business because they're not incentivized to. This is not how we operate.

As part of the engagement with KNOX, Trajectory and West Monroe considered scalability, user experience, and uptime. The transition to NetSuite as an ERP enables remote work and productivity anywhere for KNOX employees, since NetSuite is accessible anywhere with an internet connection, even on a mobile device. The system downtime for NetSuite has also been close to zero since go-live, whereas the previous AX server consistently crashed, shutting down production.

Following the implementation, KNOX transitioned to a managed services agreement for ongoing support and optimization, a testament to their satisfaction with the project and trust in Trajectory and our partners.

## Tailored Customization as a Strategic Advantage

Optimal customization is here to stay. It will continue to play a central and indispensable role in the overall strategy of organizations that aim to thrive in an ever-evolving market landscape. We see tailored customization empowering businesses to embrace change more willingly, align with the pulse of their customers, and cement their reputation in their respective niches as heralds of innovation.

Adapting technology solutions to match the unique demands of an organization comes with clear advantages.



- Reduced technical debt:** Research shows that organizations invest about 30% of their IT budgets and 20% of their IT manpower in managing technical debt. With optimal customization, organizations can minimize the resources necessary to maintain legacy environments and maximize their time and energy exploring novel ideas and experimenting with new strategies.
- Adaptability to change:** Technology and market trends will continue to evolve. Rapid technological advancements, changing customer preferences, and shifting regulatory requirements will inevitably create challenges—but they will unveil new opportunities as well. Optimal customization, in this context, serves as the key to unlocking business potential in the face of change.
- Agility and resilience amid uncertainty:** McKinsey research found that “the best CEOs don’t wait for trouble to arrive.” Instead, they “make fast and bold moves on productivity, [...] divesting during the downturn and acquiring in recovery.” Optimal customization aligns perfectly with this proactive approach. By keeping technological implementation in tune with the needs of customers and the nuances of their operations, niche businesses can pivot swiftly and purposefully during difficult times.
- Holistic value creation:** The benefits of operational efficiency as a product of tailored customization extend to the various facets of a business: elevated customer experiences, employee empowerment, strategic alignment, compliance, and sustainable growth.
- Amplification of human potential:** Optimal customization magnifies the inherent potential of individuals within an organization. Tailored tools and workflows that eliminate unnecessary complexity enhance productivity, while custom solutions built around user experience reduce the learning curve.

The business case for optimal customizations for unique businesses is clear. As demonstrated by The KNOX example, businesses that appropriately customize their technology ecosystems for their unique business requirements will have a strategic advantage over those that do not. They are able to optimize operational efficiency while delivering high-quality products and services. It is worth the time and investment in the right implementation partner to achieve optimal customization.

## Citations

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## **ABOUT THE AUTHOR**



**ALEX OLANO**  
CEO AND MANAGING PARTNER  
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Throughout his 15-year career at Trajectory, Alex's role has ranged from managing teams and projects to running the professional services organization and mentoring Trajectory's growing number of Consultants. Currently, he leads the Trajectory Team and invests his time ensuring Private Equity avoids key technology risks during their transactions.

Alex understands technology is simply the means for achieving business goals. He has guided Trajectory's organization to form its own version of Operational Improvement which combines industry and business acumen with highly effective technology implementation capabilities.

Prior to joining Trajectory Group, Alex spent 10 years in business consulting, systems advisory, and SAP implementations with IBM Global Services and Accenture.



# VALUE CREATION

Trajectory is a digital transformation consulting group, dedicated to assisting Private Equity operating teams, Office of the CFO advisory groups, and portfolio companies' executives in achieving operational excellence. Following a business-first solution agnostic approach, we assist with: Pre-Acquisition Due Diligence, Blueprinting, and Implementation of entire technology ecosystems including Salesforce, NetSuite, OpenAir, Shopify, Boomi, and GenAI.

Our cross-functional team consists of experienced business consulting, technical architecture/development, and project management professionals that follow a business understanding above technology-led implementation methodology in order to deliver high-value solutions for current and future value creation.

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