

No Stone Unturned™ Sample Assessment Proposal

(this sample is for cross-functional
system usage assessment)



Objective

Identify practical opportunities for using BPCS v4.x/6.x/8.x/ERP LX more effectively, thereby earning a higher ROI from your enterprise's investment in the software.

Deliverables

Unbeaten Path will prepare a verbal report which summarizes top line findings and recommendations and present that report at the conclusion of the data gathering visit at your site. You may elect to have a more comprehensive written report [[click here for sample](#)] prepared which provides detailed findings, the system/business practice implication(s) of each finding, and a recommendation to address the content of each detailed finding.

The recommendations will be presented in "ROI" priority order. That is, usage enhancements which would deliver important benefits and which are fairly easy to implement would be given a high priority. Items with less immediate benefits, less important benefits, or harder to achieve benefits would have a lower priority.

Strategy for conducting assessment

The assessment would consist of a series of interviews with managers and system users.

Managers would be interviewed to:

- a. Define differences between system performance expectations and actual system performance.
- b. Learn about business practice and procedure idiosyncrasies at your Puerto Rican site which have a bearing on system operations.

Selected BPCS or ERP LX system users would be interviewed to:

- c. Understand the flow of documents and information at your facility for the payment, manufacturing, and revenue business cycles.
- d. Learn about how users conduct their assigned responsibilities on the BPCS system, including first-hand observations of their system interface.

We would also work independently to review the BPCS parameter definitions and inspect the integrity of selected data files. To facilitate this, the Client will set up a temporary "Unbeaten Path" user ID with the appropriate security and remote VPN access.

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Assessment staffing

One of our Senior Application Consultants will have the responsibility for conducting the assessment on-site and preparing the written report.

Location of assessment and project timing

The on-site portion of the assessment will be performed at your Puerto Rican site during a mutually agreed upon time frame. The assessment will take a total of approximately four to four and one-half days to execute, depending on the final scope of the project.

If you elect to have a written report prepared, that preparation will require about three to four and one-half days to prepare. It would be available approximately 12 days after the site visit concludes.

To make the on-site assessment as productive as possible, we would recommend a 45 - 90 minute telephone planning meeting the week before the site visit. The proposed telephone planning meeting would cover the following subjects:

- ✧ Your key business objectives and the planned contribution of ERP systems in support of those objectives.
- ✧ The key constraints or frustrations the site is currently experiencing with BPCS/ERP LX . The objective is to assign more time during the assessment to the perceived problem areas.
- ✧ The management structure of the organization. (Perhaps an organization chart could be sent to us in advance of the telephone planning meeting.)
- ✧ The names and availability of key Puerto Rican employees who will contribute their time for assessment interviews.

Probable list of interviews

From experience we have learned that the following positions contribute to a successful system assessment in a manufacturing/distribution company. This list is **not** intended to be definitive for your enterprise. During our pre-trip telephone planning session, we can review the appropriateness of including specific individuals for your company and the most advantageous order for the interviews.

Project leadership

- ⊕ The BPCS improvement project leader
- ⊕ The IS Director

Manufacturing data integrity

- ⊕ The engineer who configures your Engineered to Order (ETO) products
- ⊕ A person responsible for specifying/maintaining technical attributes of products and product components
- ⊕ The individual who understands engineering aspects of the production process



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Probable list of interviews, *continued ...*



Scheduling production to meet expected demand

- ⊕ The individual who does the sales forecasting and demand planning for your products
- ⊕ The master production scheduler and/or manufacturing planner

Providing materials to production

- ⊕ The materials planner
- ⊕ The shop floor foreman (*suitable person to conduct a plant tour*)
- ⊕ A materials buyer from the purchasing department

Cost accounting and inventory valuation

- ⊕ The cost accountant or plant controller
- ⊕ A person who enters inventory transactions
- ⊕ A person who performs inventory cycle counting and count reconciliations
- ⊕ The warehouse manager (*suitable person to conduct a warehouse tour*)

Serving customers

- ⊕ The customer service manager / order entry department leader
- ⊕ Shipping/order-assembly/distribution manager
- ⊕ The person who confirms customer shipments
- ⊕ The person who maintains pricing/promotion/deal information
- ⊕ One of your billing clerks

Collecting the cash

- ⊕ An accounts receivable analyst

The payment cycle

- ⊕ The receiving dock supervisor
- ⊕ The person who enters accounts payable transactions

Accounting and financial leadership

- ⊕ The accounting supervisor who understands the chart of accounts structure
- ⊕ Financial Director

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