

# Fast Start in Business Analysis Road Map

## Initiation

- ☐ Enterprise Analysis
- ☐ Issues and benefits
- ☐ Stakeholders and Sponsor
- ☐ Functional flow diagram
- ☐ Objectives and scope
- ☐ **Initiation Approval**



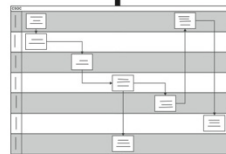
## Analysis

- ☐ Analysis work plan
- ☐ Gather information
- ☐ Current state models
- ☐ Interview stakeholders
- ☐ Document requirements
- ☐ Validate requirements
- ☐ **Requirements Approval**



## Conceptual Design

- ☐ Define a solution
- ☐ Future state models
- ☐ Impact assessment
- ☐ Implementation plan
- ☐ Management presentation
- ☐ **Conceptual Design Approval**



## Technical Design

## Development

## Testing

## Implementation

## Follow Through

## This image shows a full page of blank white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for writing or drawing. There are no margins, text, or other markings on the paper.

## Enterprise Analysis (Overview) Worksheet

### Akmee's business is:

- Industry leader in data transmission and networking components.

### Observations about Akmee (positive and negative about company goals, policies, culture, market and financial position, customer and sales situation, products and services, etc.):

- Founded by Jack Akmee in 1980 with partners, N.A. Boltz and Helen Seller, all previous engineers. Other VPs include Bill Dolar and Juan Moore Wrung both, from Earnest & Anderson, consulting firm that worked on the Chris-Ko acquisition project.
- DataZIP product originally sold to aerospace, government, and defense contractors. Also sells networking components, data compression software, and provides consulting services.
- Acquisition of Chris-Ko Networks as growth strategy, new market, customers, products and an international presence.
- Production facilities in Scotland, Malaysia, and California. Distribution facility in Denver.
- Sales are increasing every year, but net profits are decreasing due to production, inventory, and overhead administrative costs. Research and development budget has been decreased.

### Key Statistics

- Last year's sales of \$315 million, increase of 4% over previous year.
- 1,400 small- to medium- sized business customers.
- Receive and process 1,000 orders per day.
- 3,500 employees: 400 managers and employees at Denver Headquarters, 20 other offices and production facilities around the world.
- 1,300 different products in 8 product families, 750 product modifications a year.

### What has changed?

- Marketplace — Change in demand from government and defense contracts.
- Business — Small US-based business with local presence, purchased Chris-Ko Networks and expanded to an international presence.
- Product — Originally just DataZIP, now 1,300 different networking products and services.
- Customer — Originally a few large defense, aerospace, and government contractors, now 1,400 small- to medium- sized businesses.

## Project Priorities

**J. M. Wrung** [juan.wrungt@akmee.com](mailto:juan.wrungt@akmee.com)

**To: Akmee Business Analysis Team**

Thank you for providing the list of issues that we are currently experiencing here at Akmee. I knew it would be extensive, but I didn't realize how bad it really was. Your information brought to light the importance of this project. We must do something fast to stop the bleeding. But first, I need a better understanding of where you plan to focus your analysis efforts.

I want quality analysis and I want business and process improvements. I have witnessed far too many projects that failed miserably because the solution did little to fix the issues and in fact in several cases created new ones. I will not approve anything that even remotely resembles a technical "fix" that can't be backed up with a solid business case.

As you know we have limited resources and time to make something happen. The project scope that you determine must fix processes at the core of the business and day-to-day operations. If we stray from this, the company's future is at stake. I suggest that you determine a project scope that encompasses any functional areas that are related or dependent upon one another. If your scope is too small we might not be able to fix enough to move the company forward and achieve great enough results to improve the bottom line. If you scope the project too large, we will over-commit resources and the project may never be completed. I need to see a realistic scope that considers the business issues and how they can best be fixed.

I expect a lot from this team and look forward to hearing your recommendations.

*J. M. Wrung, Executive Vice President*

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## Project Definition Worksheet

### Step 1—List the relevant issues.

#### Sales Issues

- Delayed customer orders
- Pricing problems
- Impact on sales initiatives and promotions
- Sales unaware of order handling complexity
- Lack of customer records and reporting capabilities
- Lack of detailed information for sales analysis
- Sales not adding 10% surcharge on custom configurations

#### Accounting Issues

- Concerns about Sales' credit check process for increasing number of new customers
- Increasing number of slow or non-paying customers
- High outstanding accounts receivable balances
- Collection efforts being met with resistance
- Sales quoting wrong prices, not meeting costs of goods
- Customers complain about price discrepancies and disputing their invoices, refusing to pay
- Lack of service charge for the custom configurations costs the company money
- Increasing number of custom configurations

#### Warehouse Issues

- Missed delivery dates
- Decline in reputation for good customer service
- Inventory shortages
- Trouble shipping complete orders
- Inventory records not up-to-date or accurate

#### Technology Issues

- Primitive web site; customers can't see products, place orders, or send email
- Corporate wide email issues
- Out-of-date computers and infrastructure

### Step 2—Future benefits of the project.

#### Sales Benefits

- On-time customer order delivery
- Correct product pricing
- Support for sales initiatives and promotions
- Sales recognizes order handling complexity
- Up-to-date customer records and reporting capabilities
- Detailed information for sales analysis
- 10% surcharge added on custom configurations

#### Accounting Benefits

- Proper credit check process performed for all new customers
- Increased number of current customer accounts
- Reduced outstanding accounts receivables
- Reduced collections efforts and increased payments
- Accurate prices quoted to meet cost of goods
- Elimination of customers' complaints about price discrepancies and disputed invoices
- Applied service charges meet costs for performing custom configurations
- Increased revenue from custom configurations

#### Warehouse Benefits

- On-time delivery dates
- Improved reputation for good customer services
- Inventory availability to fulfill orders
- Complete orders shipped
- Accurate and current inventory

#### Technology Benefits

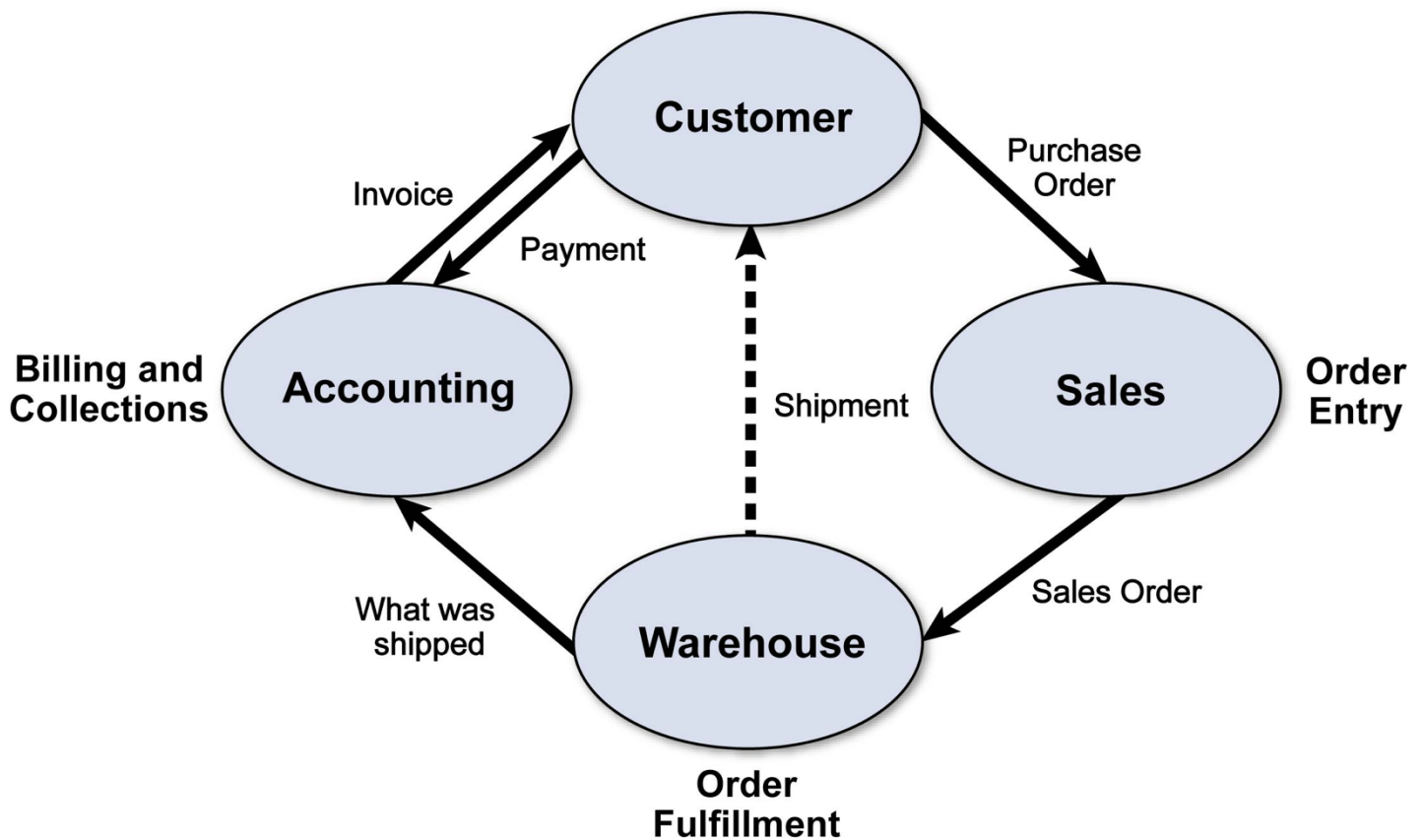
- The technology benefits will be derived from implementing a new system to support the business processes identified in the project scope

## Functional Areas

### Step 3—List the stakeholders

1. Customers
2. Sales—Order Entry
3. Accounting—Billing and Account Receivable
4. Warehouse
5. Shipping

### Step 4—Draw a functional flow diagram relating the appropriate stakeholders/functional areas.



## Objectives and Scope

### Step 5—Define the Objectives and Scope.

#### Objectives:

- Customer satisfaction will be improved with accurate pricing and surcharges, complete and on-time deliveries, and current, accessible customer and sales information.
- Business efficiencies will be realized when order entry, order fulfillment, billing, payment processing and cross functional workflow communications are improved, prices and surcharges are accurate between sales and accounting, and product information is available to determine appropriate delivery dates.
- Technology will be utilized for better overall data collection, storage, reporting, and transmission to support the business processes. There will be complete, accurate and accessible customer, product, sales order, invoice, and payment records, as well as reporting capabilities.
- Profitability will be increased with accurate pricing and surcharges, reduced invoice disputes, proper credit checks, on-time payments, and current customer accounts.

#### Scope Inclusions:

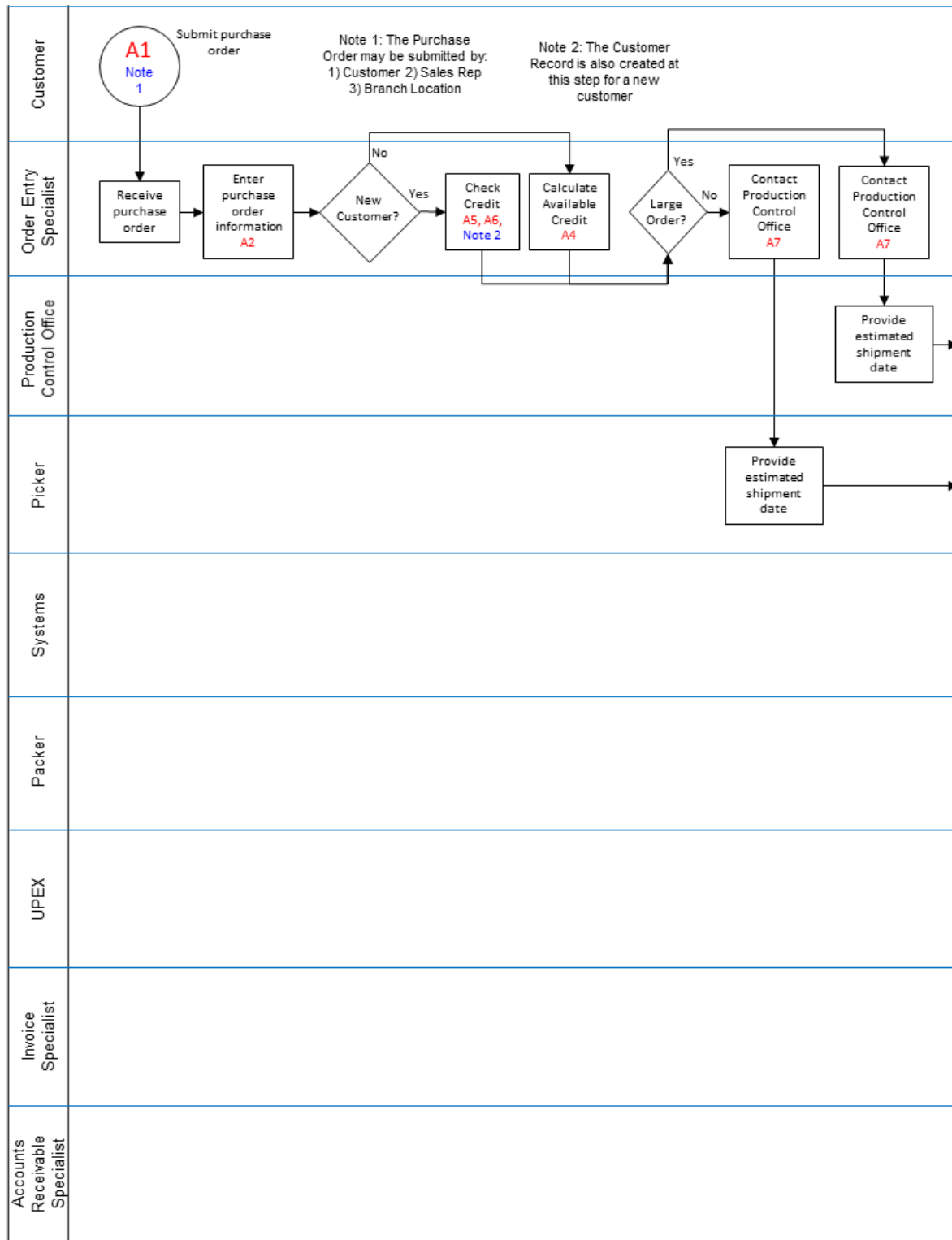
The project will focus on the Customer Sales Order Cycle (CSOC) which includes the following minimum functions:

- Order entry in the Denver Sales Office
- Customer and sales order data for sales analysis
- Order fulfillment in the Finished Goods Warehouse
- Inventory management
- Product shipment to the customer
- Invoicing the customer
- Accounts receivable of payment

#### Scope Exclusions:

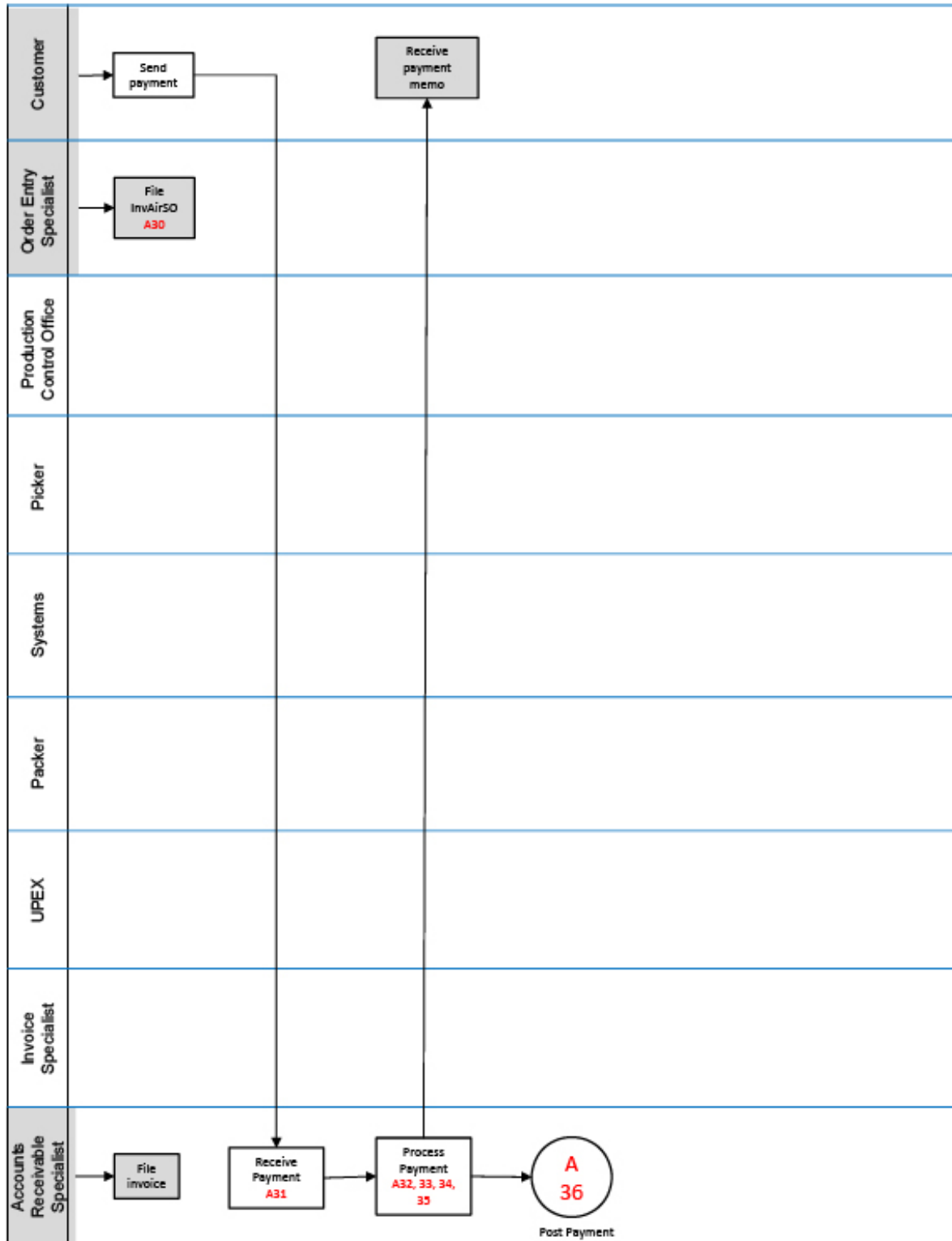
The project does not propose to analyze the:

- Branch Sales Offices
- Production or Production Control
- Market Research
- Cost Accounting
- Auditing
- UPEX
- Email issues
- Website









## Customer Sales Order Procedure Written in Process Script

<b>Actor</b>	<b>Action</b>
Customer or Sales Rep. Order Entry Specialist	<ol style="list-style-type: none"> <li>1. Send Purchase Order to Denver Sales Office.</li> <li>2. Enter Customer's Purchase Order info into sales order on PC.</li> <li>3. Verify Customer Number, and enter on Sales Order if correct. Leave space blank if a new customer.</li> <li>4. Check customer credit limit. Check Past Due Listing for unpaid Invoices.</li> <li>5. For new customers, perform fast credit rating. Assign Customer Number if credit rating is OK and enter on Sales Order.</li> <li>6. Enter new Customer Number and customer information in Customer Reference Index.</li> <li>7. Depending on size of order, phone Finished Goods Warehouse or Production Control for probable shipment date, enter on Sales Order.</li> <li>8. Print and distribute six copies of Sales Order as follows. <ul style="list-style-type: none"> <li>Copy 1—Sales Department customer file with customer's purchase order</li> <li>Copy 2—Order Acknowledgement mailed to customer</li> <li>Copy 3—Control Copy to Billing Dept.</li> <li>Copy 4, 5, 6—Stapled together and sent to the Warehouse</li> </ul> </li> </ol>
Warehouse Picker	<ol style="list-style-type: none"> <li>9. Pull stock from inventory.</li> <li>10. Initial and date the Warehouse Copy (copy 4) of Sales Order.</li> <li>11. Indicate quantity of products removed from inventory on all copies of Sales Order.</li> <li>12. Post quantity withdrawn to Inventory Status Listing.</li> <li>13. Forward Copy 4 to Systems for Inventory Master File update.</li> <li>14. Put picked products in bin and send to shipping, with copies 5 and 6 of Sales Order.</li> </ol>
Systems Packers	<ol style="list-style-type: none"> <li>15. Batch update of Inventory Status Listing, distribute each morning.</li> <li>16. Count items, check quantity shown on Sales Order, and pack items into shipping cartons.</li> <li>17. Enter Sales Order information into PC and generate Packing List. Use UPEx system to print Airbill and labels.</li> <li>18. Put Packing List in special envelope taped to outside of carton #1.</li> </ol>

19. Put a label on each carton.
20. Give cartons to UPEX to be delivered to customer.
21. File copy 5 of Sales Order with Airbill, and Packing List.
22. Attach Accounting copy of Airbill to Copy 6 of Sales Order and send to Billing Dept.
- Invoice Specialist
  23. Pull Billing Control Copy of Sales Order and staple to Copy 6 and Airbill.
  24. Enter Sales Order information into Invoice template on PC.
  25. Look up price of each product in Price List. Add 10% surcharge for all custom configured products.
  26. Determine tax status, calculate tax rate and add to Invoice.
  27. Enter shipping charges for Airbill and calculate Invoice total.
  28. Generate and distribute five copies of Invoice as follows:
    - Copy 1 and Copy 2—Original and Remittance; mail both to customer's Accounts Payable department
    - Copy 3—To Akmee Accounts Receivable
    - Copy 4—To Systems for sales statistics
    - Copy 5—Sales Department with Invoice, copies 3 and 6 of Sales Order, and Airbill
- Accounts Receivable
  29. Post Invoice in Customer account, and file Invoice for Auditing.
- Order Entry Specialist
  30. Attach Sales copy of Sales Order and Airbill to original customer's purchase order and file in alphabetic customer file.
- Accounts Receivable
  31. Open and sort mail, identify customer Payments.
  32. Match remittance copy of Invoice with copy in suspense file.
  33. Post the total payment amount to the Customer payment Spreadsheet.
  34. Stamp the Invoice "PAID", and put in paid invoice file.
  35. If no remittance copy, pull all Invoices and select one to apply Payment.
  36. Generate and distribute Payment Memos as follows:
    - Copy 1—Mailed to Customer
    - Copy 2—Put into suspense file
    - Copy 3—Sent to Billing Dept.
  37. Forward all Payments to Banking Clerk for deposit.

# **Helen D. Seller**

## **Vice President, Sales and Marketing**

Helen Seller, in charge of Sales from day one at Akmee, feels most at home with large defense contractors, governmental agencies and large companies like aircraft manufacturers. She finds the private sector small and medium-sized businesses which have become a major part of Akmee's customer base, demanding and time consuming.

Her concept of marketing rests on experience negotiating procurement contracts at Huge Aircraft based on high dollar-volume. She hasn't worked out competitive marketing policies and practices for the new Akmee product lines that she is unfamiliar with. Helen feels a little upstaged by Juan Moore Wrung, and his demands for new marketing campaigns and product promotions. She lacks the data necessary to make the best decisions and frankly hasn't tried to find or create it herself.

Ms. Seller's management of the sales and marketing department is very high level. She feels that based on sales growth year after year, they must be doing something right without her interference. She focuses on maintaining proper relationships with her big contracts and the sales staff can deal with the rest.

### **Personality**

Helen doesn't exactly resist change, she just doesn't change. She's worried about how the restructuring efforts will impact the sales area and her big contracts which she guards like a watch dog. Helen is seen as quite superior and prides herself on the way her area has grown over the years "to better serve the customers' needs." She often associates with her favorite customers on a social basis. Anyone approaching her will need to use a fair amount of diplomacy to gain her cooperation.

### **Requirements**

1. Accurate and complete customer data for marketing and sales in Denver and Branch Offices.
2. The ability to negotiate and quote prices to make a sale (with authorization).
3. An option to wave the 10% service charge for custom configurations for certain customers (with authorization).
4. "Ad-hoc" reporting (by customer, geographic region, sales associate, products, industry, etc).
5. Backend sales and customer support to handle questions about products, availability, pricing, billing issues, delivery, whatever, so that the sales reps don't have to continue "dealing" with these issues.

# Hy R. Quota

## Director of Sales

Quota has been a Director for seven years. She began as a Sales Representative in the New York office, so she knows the Customer Sales Order process first hand. Three years ago she suggested changes to the Customer Sales Order process and proposed a project. Unfortunately, neither Helen, or the other VPs supported her efforts and the project never got off the ground.

Quota wants to see some major technology advances for Sales and Order Entry. She recently began a pilot project providing sales reps with mobile devices, including BOYD (bring your own device). If the project works the way she envisions, she would like to shut down a number of the branch offices and allow all the sales reps to be virtual office (home, hotel, customer on-sight, where ever). She feels like Akmee could save a substantial amount of money and make more sales using this concept. She strongly believes that the next step in continuing success lies in using the latest technology to outdistance the competition.

Quota is also working on two other projects. She developed the President's Circle of Excellence (PCOE) which is intended to increase sales by 150% over the next 3 months by offering prize incentives (cash, jewelry, trips, cars, etc.) to the sales reps with the highest sales volumes. Quota is also at work on Juan Moore Wrung's marketing campaign to get DataZip into new markets. She is very excited about the laptop and President's Circle of Excellence projects since they were her brainchild and loves to talk about them with anyone who will listen.

Quota is very cooperative when working with Systems, but knows that she and the analysts will have to approach Seller with tact and caution. She is confident of her ability to handle Seller, but unsure about the analysts' ability to interact with her to get things accomplished.

### Personality

Quota is a doer, not a follower. She demands much from her staff, but is fair and open to suggestions. She is highly regarded by the people who work for him, as well as her peers. While she would never admit it to anyone but those closest to him, she has her eye on Seller's position, and knows she is first in line for it. Because Seller is nearing retirement age, Quota wants to make some major changes now so they will be in place and working effectively when she takes over.

### Requirements

1. Mobile devices for all sales reps and remote communication capabilities so they can enter sales anywhere.
2. User-friendly product catalog available online.
3. Access to "real-time" inventory records so the sales reps and customers know what is available.
4. Specific delivery dates for both in stock and out of stock products.
5. Reporting capabilities to define who the top selling sales reps are for the PCOE program.
6. Better order tracking so sales reps can look up order status at any point in processing.

## **P.L. Daily**

### **Director, Accounting**

P.L. is very concerned about the company's bottom line, especially since net profit has been decreasing so dramatically over the past year and a half. He is quick to point the finger at Sales and has sent a number of memos trying to create policy, but they are always ignored. He is visibly upset with sales practices for credit checks, changing or misquoting prices and not applying the surcharge. It's having a snowball effect on his area since customers are refusing to make payments and A/R balances are through the roof. His number one suggestion is to use the discount field on the sales order so that billing understands why a price has been changed and the customer can see that they've saved money. It seems simple enough, but sales won't do it.

Daily has his figures ready. There are 5,000 Sales Orders a week, which translate during processing into 6,200 complete warehouse orders, backorders and partial shipments, which correlates to 6,200 invoices, and eventually 5,280 customer payments. Many of the troubles come from extra paperwork involved with partial shipments, and clearing up the resulting backorders. The partial shipment percentage has gone from 13% of the total order volume to about 24% in the last two years. Custom configurations have also increased from 18% to 42%. Missed surcharges amounted to roughly \$4.6 million over the last two years.

Daily feels that the Sales Order and Accounting system in general is primitive. The systems in place were marginal when the focus was a few main contracts. There wasn't a need for credit checks, billing or collections before Chris-Ko because everything was contracts and large checks. The paperwork and manual filing processes are becoming overwhelming and creating a lot of errors.

#### **Personality**

P.L. Daily is a diligent, quiet, analytical type that harbors anger toward sales and their lack of foresight for the negative impacts their actions have on his area. He is willing to make changes as long as he sees the financial benefits. He is likely to fly into a triade about the Presidents Circle of Excellence and the sales laptop program because these projects will cost the company money and he feels they are pointless and egocentric. He is more than willing to assist the Business Analyst in answers questions and improving the accounting processes.

#### **Requirements**

1. Invoice information should not have to be retyped but be populated from the completed Sales Order.
2. All custom configurations, starting with "CUS" will automatically be assigned a 10% surcharge.
3. The system should perform all invoice calculations.
4. Integration between invoicing and accounts receivables for payment posting.
5. Past due accounts (over 90 days unpaid) and current outstanding invoice balance will be reported to sales prior to order entry. Sales cannot be entered for customer's who exceed their credit limit.

# **I.R.A. Checker**

## **Manager, Finished Goods Warehouse**

Most of Checker's problems come from insufficient inventory levels and "mounds of paperwork" that cause both him and the warehouse pickers a lot of work. Checker has 56 warehouse pickers reporting to him. Each picker fills an average of 22 orders per day and takes 20 minutes per order to fill and move to Shipping. This is an average of 1,240 new, partial and back orders per day. In addition, they have to stock the warehouse shelves with finished goods coming in from production. Checker's feels the warehouse is understaffed, because the pickers work overtime every week. He has been asked to reduce overtime because they are a union shop and it's costing the company a lot of extra money, but he doesn't see any other way.

I.R.A. gets mad that the warehouse is often blamed when orders are delayed. He thinks sales should do a better job quoting the correct delivery dates to reduce complaints. He also believes that his boss, Bill Dit in production, doesn't have a clue about what's coming and going from the warehouse. They are constantly receiving and restocking products sent from the production facilities that sit on the shelves and never sell. They have a huge inventory of obsolete products just taking up space. At the same time, the pickers are constantly complaining that they are out of stock on certain products like the DataZip 2000 and 3000.

I.R.A.'s being pressed to get an inventory count performed. He's not sure where to begin planning and doesn't see how it will be possible anyway considering the pickers don't have enough time to fill orders, much less count stock when they have to reduce overtime. He plans on putting it off for as long as possible.

### **Personality**

I.R.A. was promoted from the shipping dock about 5 years ago, and is unimpressed with controls, red tape, and paperwork of any kind. He is indifferent to Systems, but doesn't want to see a lot of "automation" which would put his people out of a job or create more time consuming processes. He doesn't trust computers and doesn't see any place for them in the warehouse. Checker has little respect for management, and, in fact, treats his manager, Bill Dit, with disdain. I.R.A. could care less about Akmee, the analyst, or the project. He likes fishing, beer, bowling, football, etc.

### **Requirements**

1. Have an adequate quantity of products in the warehouse to fill orders.
2. Provide customers with the correct delivery dates so that the warehouse isn't blamed for delays.
3. Hire more pickers to fill orders and reduce the need for overtime.
4. Buy another fork lift and get training for at least two more operators.
5. Reduce all the unnecessary paperwork.



# **Will B. Pickens**

## **Warehouse Picker**

Will B. Pickens has worked for Akmee for the past six years. He is the most senior Warehouse Picker. He has a great deal of knowledge about how the current Customer Sales Order process works, and sees a number of flaws that he thinks could be easily remedied. He is aware that proposals for change have been made in the past and that little if anything was accomplished.

Will is somewhat reluctant to cooperate with the project team because he is afraid that major changes to the process could cost him his job. He knows that Quota is pursuing the development of a system that would allow Sales Reps to enter their orders directly on-line. This makes Will kind of nervous since he is used to getting a three part Sales Order in hand to begin the picking process. If they are online, he is unsure about how the picker's will be notified of the orders.

Will overheard some sales people talking about the President's Circle of Excellence in the cafeteria and is furious. He rants to I.R.A. about the sales people getting cash gifts, jewelry and trips and stuff, when they already drive the fanciest cars, get paid to golf and eat steak dinners and fly all over the world smoozing with customers. No one recognizes how hard the pickers work in the warehouse and now they want to cut overtime pay. It's just not fair! Will and many of the other pickers depend on their overtime pay just to make ends meet.

### **Personality**

Will is 28 years old and married with two children aged 6 and 3. He refused his parents' offer of college when he graduated from high school because he wanted to get a job and marry his high school sweetheart. After working at minimum wage positions for four years, he realized that the only way he would be able to get ahead was to go to college. He is attending an accelerated program through the local university, but still has at least two years remaining before he can graduate with a B. S. in Production Management.

Will and I.R.A. Checker get along very well and frequently hang out together outside of work. I.R.A. admires Will's determination, and doesn't want to see him lose his job. Recently, I.R.A. has been tutoring Will in the production and warehouse business, and would like to promote him so he can make more money.

### **Requirements**

1. Eliminate backorders, only notify picker's when products are available to complete an order.
2. Eliminate extra paperwork for backorders. Currently the picker has to write the quantity picked, and make three copies, highlighting the partial order and blacking out the filled items for all backorders.
3. Provide identification for each picker so they don't have to initial the sales order.
4. Make the Inventory Status List accurate. Currently none of the numbers on the report match the numbers on the shelves which means pickers are wasting time.
5. Eliminate the process step which requires the picker or manager to record items removed from inventory on the Inventory Status List since it's not accurate anyway.
6. Make sure all the pickers are trained to use the new process so there won't be delays.

## Requirements

### Sales Requirements

1. Accurate and complete customer data for marketing and sales in Denver and branch offices.
2. The ability to change product prices with authorization.
3. An option to waive the 10% service charge for custom configurations for certain customers (with authorization).
4. “Ad-hoc” reporting (by customer, geographic region, sales associate, products, industry, etc.).
5. Backend sales and customer support to handle questions about products, availability, pricing, billing issues, delivery, etc., so that the sales reps don’t have to continue dealing with these issues.
6. Mobile devices for all sales reps and remote communication capabilities.
7. Product catalog available online.
8. Access to current inventory records so the sales reps and customers know what is available.
9. Specific delivery dates for both in-stock and out-of-stock products.
10. Reporting capabilities to define who the top selling sales reps are for the PCOE program.
11. Better order tracking so sales reps can look up order status at any point in processing.

### Accounting Requirements

12. Invoice information should be populated from the completed Sales Order and the airbill.
13. All custom configurations starting with “CUS” will automatically be assigned a 10% surcharge.
14. The system should perform all invoice calculations.
15. Integration between invoicing and accounts receivables for payment posting.
16. Past due accounts (over 90 days unpaid) and current outstanding invoice balance will be reported to sales prior to order entry. Sales cannot be entered for customers who exceed their credit limit.

### Warehouse Requirements

17. Have an adequate quantity of products in the warehouse to fill orders.
18. Provide customers with the correct delivery dates so the warehouse isn’t blamed for delays.
19. Hire more pickers to fill orders and reduce the need for overtime.
20. Buy another forklift and get training for at least two more operators.
21. Reduce all the unnecessary paperwork.
22. Eliminate backorders; only notify pickers when products are available to complete an order.
23. Provide identification for each picker so they don’t have to initial the sales order.
24. Make the Inventory Status List accurate. Currently, none of the numbers on the report match the numbers on the shelves.
25. Eliminate the process step which requires the picker or manager to record items removed from inventory on the Inventory Status List since it’s not accurate anyway.
26. Make sure all the pickers are trained and have support to use the new process so there won’t be delays or take up more time.

## Assumptions and Constraints

### Assumptions

1. If the President's Circle of Excellence generates a 150% increase in sales, the new process and systems will need to accommodate the growth.
2. Changes to the process will not increase the time it takes to place, fulfill and invoice orders.
3. The process and system changes will not be dependent on the inventory count being completed.
4. Changes to the process and new systems must be easy to learn so pickers can get up to speed quickly.

### Constraints

1. The project changes must not negatively impact the existing big contracts that Helen maintains.
2. Credit checks must be performed by an external, third-party credit agency.
3. Product prices and surcharges stored in the new system cannot be changed without a review committee discussion and approval.
4. Invoicing and payment posting processes and systems will comply with appropriate accounting and auditing practices.

Implementation Plan		Weeks (2-week periods)																			
Task	Assigned	2	4	6	8	10	12	14	16	18	20	22	24	26	28	30	32	34	36	38	40
Management approval	Exec. Comm.	•																			
Additional analysis— Detailed Requirements Specification	Business Analysis team	—	—																		
Technical Design Technical Specification	Systems team			—	—																
Technical Design Approval Revised development schedule and budget	Exec. Comm.				•																
Order and install equipment	Purchasing and Installer					—	—														
Build database tables	Programmers or DBA					—	—	—	—	—	—	—	—	—	—						
Programming interfaces	Programmers									—	—	—	—								
Test programs, databases, and tables	Systems team									—	—	—	—	—	—						
Inventory count in Warehouse	Warehouse staff												•								
Input data (customer, product records)	Data Entry												—	—	—						
Develop job instructions and training material	Systems and H.R.												—	—							
Train Denver and branch Sales Reps	Systems trainer													—	—	—					
Pilot system at branch	Systems team															—	—				
Periodic announcements	Project Mgr.	•			•			•		•		•		•		•		•		•	
Final update of programs, databases, and tables	Systems team																—	—			

Implementation Plan		Weeks (2-week periods)																			
Train warehouse/shipping	System trainer																				
Train Accounting dept.	System trainer																				
System cutover	Systems team and users																				
Dispose of old system and obsolete inventory	Systems team and Warehouse Manager(s)																				
Follow-up	Systems team																				
Big party!	Systems team																				

## Management Presentation

**J. M. Wrung** [juan.wrungt@akmee.com](mailto:juan.wrungt@akmee.com)

**To: Akmee Business Analysis Team**

I appreciate the phone call yesterday afternoon regarding the presentation you are preparing. I talked to Jack Akmee after talking to you and he is looking forward to your presentation.

You asked me about the business case for your presentation. Please tie your recommendations to the objectives I sent to you in my earlier email. I am confident the senior leadership team will consider your recommendations carefully because you clearly did your homework, looking at the whole picture including processes, systems, and the organization. In your presentation, please be respectful to the people who built this company and keep your attention focused on the future.

We must consider the impact to the organization if we change too much too fast or spend too much money. We clearly need a long term target but we need to pick where to start. Over the next several years we are expecting to make a significant investment in the organization's future.

*J. M. Wrung, Executive Vice President*

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*Vice President, Sales and Marketing*

Warehouse Picker

Will B. Pickens

Warehouse Picker

Will B. Pickens



**I.R.A Checker**  
**Manager, Finished Goods Warehouse**

**I.R.A Checker**  
**Manager, Finished Goods Warehouse**

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# P.L. Daily

Director, Accounting

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