



**OPTYMO**

# Deployment

## **Preamble**

No matter the size of your company, implementing a cross-departmental solution is a critical project that must be taken seriously. From concerns about cost and demonstrating ROI, to practical considerations about who will manage the process, Optymo implementation efforts require commitment by a project team and support by business leaders to ensure success.

There's no getting around the fact that such a deployment is a major undertaking, but the process doesn't need to be painful. With proper planning and execution, implementing Optymo should be a smooth process and quickly improve efficiency across your business.

### **Set Realistic Expectations for the Implementation**

Optymo is a powerful solution that can streamline processes, improve visibility and reduce costs but it won't happen overnight. Optymo encompasses many complex processes, from BOM and parts management to manufacturing and accounting, which need to be integrated to create a seamless experience for end users.

This takes careful planning and time to execute. The average INLYNK customer can implement Optymo within three to four months. INLYNK will be of assistance by keeping best practices top of mind to guarantee a smooth deployment. Launching the implementation and keeping it on the right track throughout the entire process is essential to the success of the project.

## Step 1: Mandatory steps for a successful deployment



The most challenging component of the Optymo implementation is getting started. Knowing the philosophy of Optymo and understanding the concepts of predictable performance and accurate planning is quite different from understanding how to put the pieces into place to introduce the kinds of change that affect not only the processes and procedures but also the culture.

Few operations can truthfully report a smooth start-up with no snags whatsoever, as Optymo implementation is a major change for most organizations. However, for companies with successful implementation there are specific actions that have been documented as fundamental to their success.

### **Education**

The education process for an ERP is broken into three phases. The first phase is top management education. The most successful approach to top management education is for the top management to attend Optymo training (typically first day). This phase of the education should cover the concepts of Optymo, how these concepts apply to your company, the changes required to make it happen in your company, senior

management' s role in the implementation, performance measurements and the steps to success. The most successful approach in the top management education is to proceed as a team. By participating in the education as a team a consensus and common vision as to how to move forward as a company (action plan) can be formulated.

The second phase of the education is for operating management. The operating management education typically is for 10-25% of the organization. The education should encompass department managers, first line supervisors, project team members and key staff/support. The operating education is normally a two-day training.

The third phase in the education process is directed at the critical mass of the company. For companies successful in their new business system implementation 100% of the organization receives some form of education and training. After all, what is Optymo about? It is about reinvesting in the people, raising the technical competence throughout the organization, not simply implementing software.

### **Leadership**

Leadership is one of the most critical factors in the successful implementation of Optymo. In a company, the super user must be a senior manager champion for the new system implementation. Preferably the senior management champion should be the president or a person in charge of the business. Why? The Optymo implementation cuts across the entire organization and there should be only one person with the authority to organize the resources.

### **Value Positioning**

Part of the effort is to document the reason for the focus or high priority put on the implementation effort. One of the first tasks or assignments of the project team must be to justify the costs of the implementation. By the mere assignment from top management to the project team, top management has acknowledged that it believes or suspects that there is a justification for the expenditure of resources and money, but the team and functional managers must also acknowledge the expenditures and personally sign up for the resulting benefits. Benefits that are typically and realistically listed are:

- Enhanced data accuracy
- Reduced inventory
- Improved delivery performance
- Improved product quality
- Improved quality of life for employees
- Reduced purchasing costs
- Increased sales from competitiveness
- Improved productivity

### **Performance measurement**

The true measure of success in an Optymo implementation is about the operating performance gained in the business, not just the financial performance.

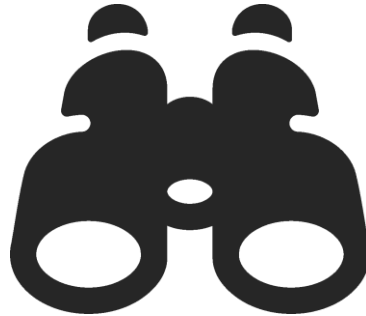
Performance measurements should focus on rates of improvement to drive the habit of ongoing or continuous improvement. Management should also look at performance measurement as a way to highlight or provide focus to the problem areas. In areas below 95% performance, an action plan to improve the performance is required.

### **Handshake management**

When an organization decides to make the commitment to implement Optymo, it commits to major changes, new ways of doing things, and new ways of thinking. There will be excitement generated, and in the best environment creativity will flourish. If the general population within the organization is afraid to try new things, positive change will not happen, as it should. The way to ensure the most creativity is to create an environment where people are coached and expected to take some chances with new ideas that are anticipated to make a positive influence. The resulting enthusiasm can become dynamic.

Management must display a positive attitude that supports empowerment and gives the authority to initiate change, allow and reward it. This is handshake management, the antonym of foxhole management. Characteristics of foxhole management include waiting to prey on employees who make a mistake regardless of the motivation behind the action. Blame or finger pointing is also an important characteristic of foxhole management.

## Step 2. Understanding the internal processes of the company



One of the characteristics of high performance companies is their predictable level of operating performance. These companies have instilled a habit of ongoing continuous improvement throughout the enterprise. Business processes have been scrutinized to eliminate non-value added activities through factory and business simplification.

Companies striving to receive the maximum payback from their implementation of new business systems review business processes to eliminate variations in the processes and improve operational performance. Typical examples of business processes that companies must scrutinize during their implementation are:

Bills of Material - 99%

Accuracy Inventory - 98%

Accuracy Routings - 99%

Accuracy Sales & Operations Planning

The sales and operations planning process is a monthly activity as well as updates of demand forecasts and establishing rates of output in the form of an operations/production plan.

### Step 3. Gathering and analysing the required data



Database analysis is the process of extracting the data and cleaning it. Many databases grow and develop through use and contingency and consequently the first stage of extracting the data can be complicated, not just from the scale of the task, but because the database itself is poorly documented, some data is missing or has been moved.

Surprisingly enough, obtaining database information can be one of the most time consuming tasks involved in database analysis. This is not necessarily because it is difficult, but most information resides on transaction databases that are continually being used, updated and changed as orders come in and out. Often obtaining the data needs time to be scheduled and a spec to be written to pull the necessary information out without interfering with the day-to-day running of the database.

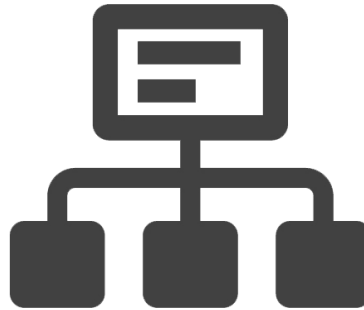
Once data has been obtained, it normally has to be cleaned for analysis. Many databases tend to build up inaccuracies and duplicates over time. For instance, as addresses change, postal codes are entered incorrectly, or there may be duplication of records caused by mistaken data entry.



## OPTYMO Deployment

The process of cleaning can be automated to a certain degree including de-duplication and cleaning up missing or bad data, but often there is an element that needs to be done by hand. It is typically a very thorough process to avoid losing data integrity. The INLYNK staff will help by providing guidance however this phase is most often led by the customer.

## Step 4. Building the database



One may need to do a large number of table insertions when first populating a database. Parts, BOMs, suppliers, customers and related information must be in the Optymo database before the customer starts to use the product.

Populating the database is a task to be accomplished by the Super User. At this stage the corporate processes will be reflected in the product. Once all the information is imported, the INLYNK team will make sure that a copy of this database is made.

Minimum requirements to set up the Optymo database:

- List of currencies in which the company deals. The first currency defined in Optymo is going to be the default currency in which the value of the inventor is going to be calculated. Please complete the file provided named "Currencies"
- List of taxes in which the company deals. The first tax defined in Optymo is going to be the default one. Please complete the file provided named "Taxes"
- List of countries in which the company deals. The first country defined needs to be the one in which the country is being registered. Please complete the file provided named "Countries"

-

## OPTYMO Deployment

- List of all suppliers. Please complete the file provided named "Suppliers"
- List of all customers. Please complete the file provided named "Customers"
- List of all parts that need to be in Optymo database. How many digits are required for the Internal P/N incremental section after the "-" ex: ABC0001-**0001** or ABC0001-**00001**. Please complete the file provided named "Parts list"
- List with the company future users of Optymo. Please complete the file provided named "Optymo users"
- The exact name of the company, needs to be less the 32 characters
- The logo of the company in high resolution, preferably in .png or .bmp format.

After the completion of the training and before going "LIVE" , it is mandatory for the users to start using Optymo in parallel with their actual processes by replicating all "jobs" in Optymo.

## Step 5. Appointing the “Super User”



The “Super User” and the team are integral to the success of the implementation. The Super User should report to someone at the top of the organizational hierarchy. Most companies have the Super User report directly to the CEO or president. Do not have the Super User report to lower levels of the organization as this sends the message that the project is a low priority. Optymo cuts across all functional areas and there is only one place in the organization where that happens in a company at the top!

The Super User should represent the entire organization, with an objective to manage all the resources across the business from all functional areas. The team members will report to the Super User with a dotted line reporting structure while still reporting to their existing functional managers in daily activities.

As upgrades are deployed, Super Users will:

- Leverage their experience by assisting end users in understanding the options and alternatives that are available as a result of the new software release.
- Translate the options and alternatives into IT terms.
- Assist with implementing the upgrade and presenting it to the user community.
- Contribute to ongoing business process development.
- Work closely with the IT organization to determine what system configuration is needed to support the new or changed process.

## Step 6. Training the users



Attendees must be competent with the Windows environment and have some basic knowledge of Excel but no previous Optymo experience is required.

- Administrator Training

The administrator training will focus on training of the Optymo structure and processes. This practical, hands-on session will provide the Super User with extensive and detailed exposure to setting up, using and administering Optymo. The training will use the clients own test database so that delegates can practice using the functionality before using it in a live environment.

- User Training – R&D functions

This practical, hands-on session will provide delegates with experience using the authoring functionality available in Optymo such as using the BOMs and parts management features. It will also cover the creation of parts and the import of data coming from different sources.

## OPTYMO Deployment

- User Training – Purchasing with Optymo

The training will cover the different functions offered by the purchasing environment.

- User Training – Customer module

This session will cover all the features related to the customer module including the import functions associated to customer management.

- User Training – Manufacturing module

Most of the training activity will be related to the production module and the processes associated to the manufacturing of an electronic system.

## Step 7. Mapping internal processes to be used in Optymo



There are two distinct schools of thought when it comes to software integration in a business environment. One position is to argue that there is no software product that truly meets the company needs. “Our business is different,” or “we do not operate the way the software does or is forcing us to in this area.”

In this case, companies purchase a software product and set about altering the product to the current business environment. Many companies spend as much time and money altering the product as they paid for it in the first place. Experience has shown that companies typically end up modifying new software to look like the old product they operated with. For example, screens and reports are modified at user request to change the new tool because the user is used to a particular format or screen.

Another major reason for software modification is that the company does not want to address the issues created by implementing the new software. Rather than management addressing each issue on “how and why we do business this way” , the issue is bypassed in favour of software modification.

There is no favored approach, however what successful companies are doing is looking at their operational performance and mapping business processes to identify areas of improvement. From this it can be determined



how software fits and how it should be implemented. The recommendation is to think of software as a 90% to 95% solution.

In other words, when modifications are discussed, break them into two simple categories. First a “need to” modification is a showstopper. This basically says the project cannot move forward until this change is made. These are the modifications to discuss as a team. If the decision by the team is that the Optymo project cannot proceed then the modification probably should be made. The second category is the “nice to have” modifications. These are modifications to the software people would like to have. These types of modifications are normally due to what was discussed before where people are used to the old screens and reports and want them back.

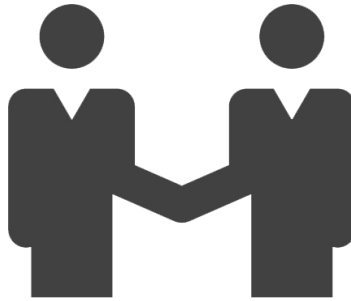
It is also important to acknowledge that when new software is purchased part of the decision is probably due to the fact that the software company has made a commitment to continuously upgrade and improve their product. In this case, too many company modifications would make it extremely difficult (time and money) to convert to the newly released upgrade or version.

## Step 8. Building the real database and going LIVE



The requirements for the build of the LIVE database are the same as for the training one. Once the database has been built, it will be copied to the demo server for training purposes and also to test new protocols or processes before implementation on the LIVE database.

## Step 9. Supporting the company



INLYNK offers to its customer an on line standard support package and a customized support package. Standard Support provides email support to Optymo users, software updates and access to the online “How To” videos and/or multimedia material developed by INLYNK. Premium support includes remote assistance both online and over the phone, proactive support via the INLYNK “E-lunch & Learn” sessions.