Step 3: Discovery & Your Needs Assessment

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We perform a needs assessment through a series of meetings called the Discovery Process ("Discovery"). Discovery is essentially an exchange of knowledge. It typically proceeds in three overlapping phases.

Our initial emphasis in the first phase is for you to learn the software. As your understanding of the software increases, we then shift attention to learning about your business. Whenever we identify a gap where the software isn't doing quite what you need, we'll take notes on possible items to customize for your system. During the third phase, we'll return to those notes, discuss what's still relevant or what has changed, and create a development plan. The development plan will outline any needed customizations, provide a cost estimate, and set a timeline for the implementation.

We have worked with a long line of customers, each time learning more about how to set the stage for a successful implementation. The Discovery Process leverages that experience to benefit your company.

Summary of the Discovery Process

1. Kick-Off Meeting
2. Purchase Orders
3. Simple Sales Orders
4. Sales Orders & POs
5. Manufacturing and Production Orders
6. Inventory
7. Shipping and Invoicing

8. Accounting
9. System Administration
10. Additional Topics as Needed

Note: Some of these topic areas may require multiple meetings.

Understanding the Kick-Off Meeting

The Kick-Off Meeting helps establish clear expectations and get everyone on the same page for what needs to be done to ensure a successful implementation.

Training Your Super Users

All members of your Discovery Team will become aACE super users. This means that even though a person's job only deals with one area of the business, they will know how users are going to interact with the system from start to finish.

It is vital to have a handful of super users who know how all the dots connect. This supports an implementation approach where we roll the system out incrementally to your other users. We show where each role starts and ends in aACE. However, your super users are leaders who know what processes and records are needed before their own responsibilities, as well as what processes and records are needed after.

In short, some information during Discovery might not be 'directly relevant' to a super user's role. But training a core team that understands the big picture of your company workflows is a critical element for your successful implementation.

Homework After Discovery Meetings

An effective Discovery Process requires hands-on work in a demo aACE system. We will send everything needed to set up your demo system and get logged in.

During each Discovery meeting, we will go through a number of activities in the software. Afterward, a recording of the meeting will be emailed to your Discovery Team. Then it will be each team member's “homework” assignment to log into your demo system and replicate the tasks shown during the meeting.

During your practice, you should use data relevant to your company. aACE divides data into two general categories:

- Master Data — This includes the records needed in order to conduct a business exchange (e.g. customer companies, vendors, products, team members, etc).

- Transaction Data — This includes the records for an actual business exchange (e.g. purchase orders, sales orders, shipments, etc).

We recommend that you use real information for master data, but use test information for transactions. In other words, you would create a company record for a vendor that you actually order from. But then you would create a purchase order that does *not* reflect actual business needs.

We also recommend that you practice manually creating several records of each kind. This practice helps cement the understanding in your memory. After your Discovery Team has created some records, additional records can be imported easily.

The practice data can be cleared from your system easily. Transaction data is typically removed from the system when you go-live with your aACE system. Master data can also be removed at go-live or can be left in the system, per your preference.

Webinars and Discovery Meetings

The aACE library of webinars complements the Discovery meetings. Ideally, you can prepare for a Discovery meeting by watching a webinar ahead of time and trying out the relevant tasks in your demo system. Then you can use the meeting time to ask questions about the details most important to your work.

aACE Basics Learning Module

After one of the initial Discovery meetings, we will send a link to the aACE Basics learning module. This online module includes an introductory webinar. Your Discovery Team can watch it, then work through the learning module quiz. The quiz focuses on questions you can answer by working in your demo system. It is an 'open-book' assessment designed to accelerate you through the learning curve of working with aACE.

Discovery Process Agenda

As summarized above, the Discovery Process begins with the Kick-Off Meeting, then follows a standard order of operations:

- Payables / Purchase Orders — We start with AP and POs because these processes tend to be more common from company to company. We will demonstrate ways you can enter line item codes (LICs) for the products you purchase. Then we'll show a basic process to enter a PO, receive a shipment of goods, then use the bill from the vendor to create a purchase. Completing these steps automatically closes a PO.

Note: This common ground makes it a good place to learn the conventions of the software and it also lays the groundwork for the next topic. we’ve worked hard to make sure aACE modules are consistent, so it should be easy for a user to temporarily wear multiple hats

- Simple Sales Orders — Processing some POs puts some inventory into your system. So after showing the A/P processes to buy-receive-purchase, we'll demonstrate the parallel A/R processes of sell-ship-invoice. Completing these steps closes the order. At this point, we can start to introduce some business process intricacies, since the nature of managing fulfillment typically makes it more complex.
- Linking Sales Orders and Purchase Orders — Some companies need to address situations where you special order something for a specific sales order. We'll also talk about drop shipments. If these workflows are not applicable to your company, we move on.
- Manufacturing and Production Orders — Often companies will need to purchase things from suppliers in order to produce their products. We review how to enter orders to know what to build, including discussion of BOM, jobs, tasks, task groups, special orders, plus calendaring and scheduling. These workflows are often prerequisites for subsequent tasks. The complexities of these workflows often require multiple meetings. However, if they are not applicable to your company, we move on.
- Inventory Management — After receiving and producing goods, we can deal with inventory. This area of the system runs parallel to accounting, in the sense that you must input information in order to understand the outputs. We'll demonstrate tools for backorder management, reorder management, bin management, and more.
- Shipping and Invoicing — At this point, we'll demonstrate building a courier/carrier invoice, organizing your billing terms, setting up progress billing, handling deposits, and other topics.
- Accounting — This area is addressed at the end because, like inventory, there must be data in place in order to see these modules operate. Also, there is a lot of prerequisite knowledge that allows users to successfully address these areas. Topic areas include recurring transactions, financial statements, COGS and inventory lots, general journal, paying bills, recording deposits, GL budgets, tax profiles and tax setup (including postal codes).
- System Administration — This area is also addressed at the end because there must be data in place in order to see these modules operate. We will show tools to manage users, user groups, permissions, postal formats, teams, and notice setups.
- Floating Topics — Additional topics can be inserted anywhere in the process, depending on where they come up in the conversation and how relevant they are. These topics can include CRM and sales leads, projects, commissions, rate cards, oversight preferences, and reporting.

Prioritizing Your Customization Requirements

As we move through Discovery, you will most likely identify some areas that require customization. These customizations can vary from small system tweaks to major workflow changes.

To help keep your project running on time and on budget, we put these requirements into two buckets:

Bucket #1 — Must-Have List

These customizations must be in place before your go-live date. To bring your system live as quickly as possible, we recommend focusing on those customizations that bridge gaps in workflows or that drastically improve efficiencies and will show big returns early on.

Bucket #2 — Wish List

These customizations would be nice to have at some time in the future. They are not required for the go-live, so we often postpone the detailed discussions about these customizations until the staff has fully settled in with the new system.

This list is revisited later and discussed in greater detail. Then we map out a plan for ongoing system enhancements that work with your timeline and budget.

Development and Implementation Plan

Once we complete the Discovery walkthrough, we present a development plan that outlines the customization requirements. The plan includes accurate timelines and cost estimates for the entire system implementation.

Upon your approval of the final proposal, we schedule the necessary resources that will be dedicated to your implementation project.

Benefits of the Discovery Process

We Learn About You

The best way for us to learn about your business is through discussion and examples. We start from an initial sales opportunity and move through the sales cycle. Then we step through fulfillment and finally move through billing. We learn the details of how you work, why you do what you do, and what your expected results are from each process or procedure. You'll explain the deficiencies in your current processes and we'll discuss solutions for improvements.

You Learn About aACE

As we learn about your workflows, we show you examples of how you can use aACE. Together, we walk through each process on-screen and discuss each step along the way. Then you'll get hands-on with aACE by playing in a sandbox version. You'll work through examples using your own data, which makes it easier to learn.

The Sandbox

You will have access to a hosted version of aACE, which we call a sandbox. After each discovery meeting, you will have the opportunity to practice and learn the tasks we demonstrated in the sessions. You'll use your own data and walk through real examples so you can identify any missing links. As you go, you will start to envision daily work with aACE and discover new ways of making your workflows more efficient.