Begin with the End in Mind

Start with the right foot forward by choosing the right project approach. Our results-driven process will lead your business over the bridge to success. You're one step closer to your business's open source transformation.

The Bridge

The Bridge is a deeper dive into the first half of our proven method for success. Our team starts with an analysis of your business by identifying, reviewing, and understanding your technology and operational SWOTs. Next, we make the rightsized fit by determining the true needs and requirements to optimize your business. Then, we create a plan by documenting milestones and identifying risks so that you have an accurate scope, timeline, and budget for your business.

ANALYZE

Identify, review, and understand the tech and operational SWOTs for your business.

RIGHTSIZED FIT

Determine the true needs and requirements to optimize your business and how to address them.

CREATE A PLAN

Document milestones and identify risks to receive an accurate scope, timeline, and budget.
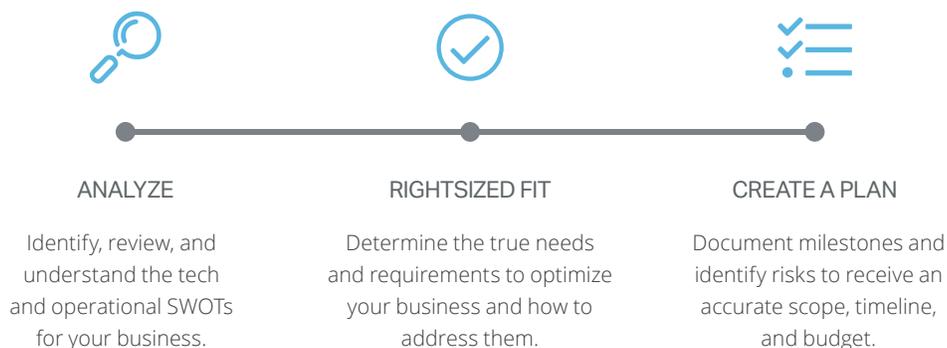
Sample Agenda for 50-100 Users

The workshop schedule will be adjusted to meet your needs and should be completed over the course of a week. For the workshop to be successful, it's best to have a representative from marketing, accounting, sales, engineering/development, production, and supply chain/logistics.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Review: - BUSINESS NEEDS - REQUIREMENTS - WORKFLOWS	**Configure Accounting:** - COA - JOURNALS - AR & AP - REPORTS	**Configure Operations:** - PROJECT - TIME KEEPING - MANUFACTURING - BOMS - ROUTINGS - WORK CENTERS - ETC	**Configure Sales & Quoting:** - PRICELISTS - SALES TAXES - MARGINS - POS - ECOMMERCE	Data Backup and Snapshot Creation
OR & CM: - ORGANIZATIONAL READINESS - CHANGE MANAGEMENT	**Warehouse & Products:** - PRODUCT DEFINITIONS - INVENTORY - STOCK MOVES - RE-ORDERING RULES - TRACEABILITY	**Purchasing:** - SUPPLIERS - RFQ - POS - INVOICING - RECEIVING	**Data Topics:** - IMPORTING - CONVERSION - REPORTING - LEGACY DATA	Security and Monitoring Considerations
Start on Accounting Configuration	OR & CM	**CRM:** - ORDER TO CASH - COMMUNICATIONS	OR & CM	Advanced Topics
		OR & CM		Construct Roadmap for Remainder of Project
				OR & CM