Business Process Implementation

Company Overview

Transforming Companies Through Best Practice Education and Implementation

Presentation Outline

- About Soltec
- Best Practice Solutions
- Services
- Clients
- Team Work Approach
- Best Practices Implementation

Soltec Inc. Consulting Practice

Education

Implementation

To deliver high-impact business process consulting services and implement industry proven end-to-end Best Practice Solutions™

Best Practices Expertise

Finance, Accounting, Treasury

Supply Management

Customer Relation Management

- **Evaluated Receipts Settlement**
- **Procurement Card**
- **Financial Closing**
- **Shared Services**
- **Simplified Travel & Expense Reporting**
- **Inter/Intra-Company Settlement**

Process Development and Improvement

Best Practices Expertise

Finance, Accounting, Treasury

Supply Management

Customer Relation Management

- **Production Demand Replenishment**
- **Material Requirements Planning**
- **Material Receiving and Movement**

Process Development and Improvement

Best Practices Expertise

Finance, Accounting, Treasury

Supply Management

Customer Relation Management

- **Order and Revenue Management**
- **Warranty Claims**
- **Customer Contact Center**
- **Customer Service Management**
- **Advertising and Promotion Management**

**Process Development and Improvement**

Business Affiliate Network

We utilize a network of business affiliates with expertise in all aspects of Business, Distribution & Manufacturing processes.

Soltec Business Model

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┌──────────────┐        ┌──────────────┐        ┌──────────────┐
│   National   │        │    Direct    │        │  Executive   │
│   Seminars   │────────│  Marketing   │────────│  Education   │
│  (Revenue)   │        │              │        │   Webinars   │
│              │        │              │        │ (Promotional)│
└──────────────┘        └──────┬───────┘        └──────────────┘
                               │
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                        ┌──────────────┐
        ┌──────────────▶│  On-Site or  │◀──────────────┐
        │               │    Webinar   │               │
        │               │  Education   │               │
        │               │  (Revenue)   │               │
        │               └──────┬───────┘               │
        │                      │                        │
        │                      ▼                        │
┌──────────────┐      ┌──────────────┐        ┌──────────────┐
│    Repeat    │◀─────│Best Practice │───────▶│  Referrals   │
│ Engagements  │      │Implementation│        │(New Clients) │
└──────────────┘      └──────────────┘        └──────────────┘
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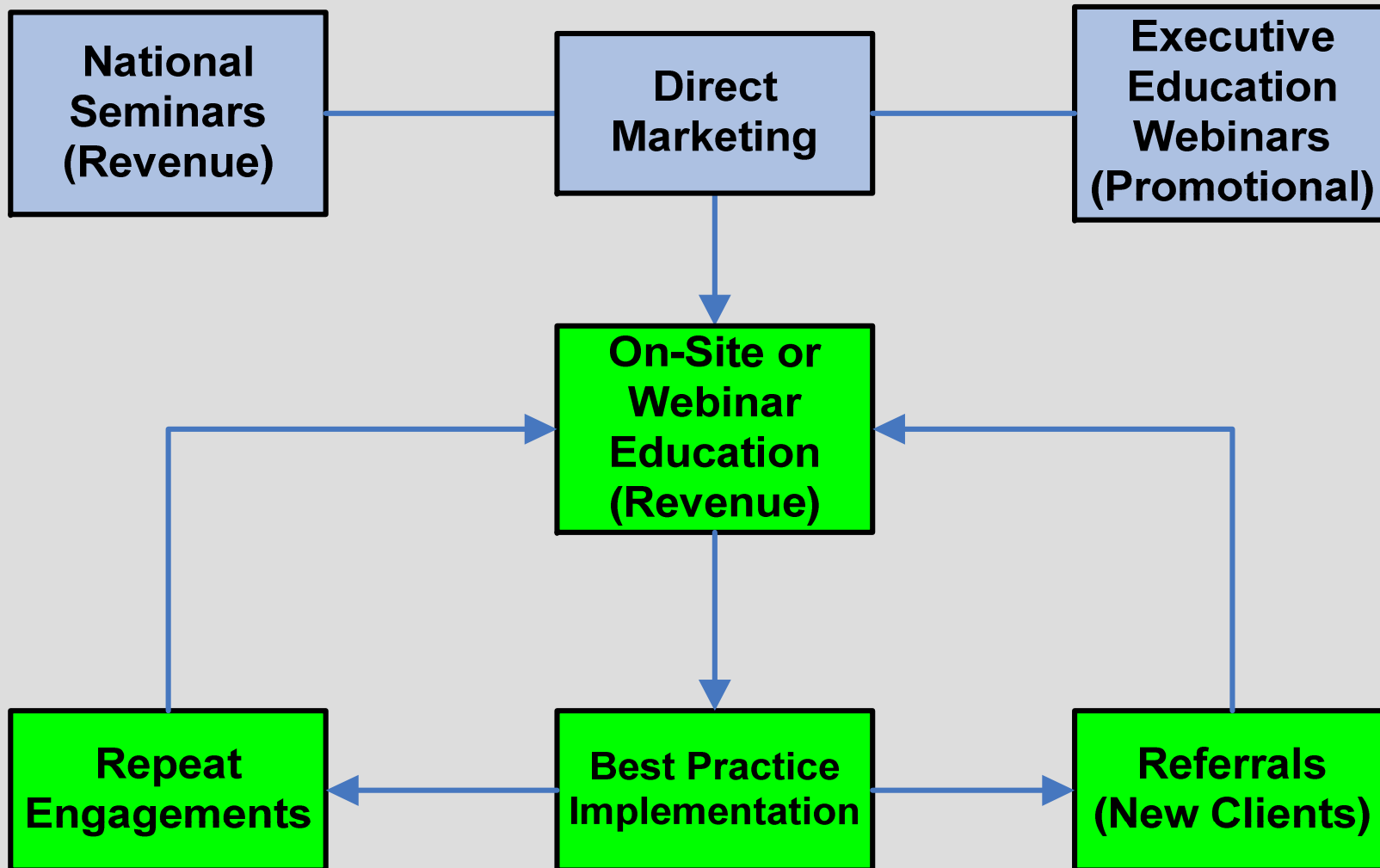
Implementation Services

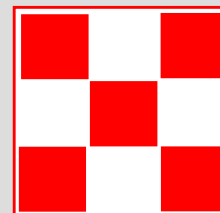| Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Project Start Up	Proce ss Unders ta cts	Futur e Sta	Pilot Start Up &	Full Imple ment

- Education and Awareness for Understanding and Securing Executive Sponsorship
- Proven Turnkey Project Plan / Implementation with Pre-defined Meeting Agendas
- Content Expertise to Provide Best Practice Models at the Core Business and Detailed Functional Levels
- Current State Process Improvement Opportunity Analysis and Benchmarking

- Documentation, Presentation, and Training Materials to Support Best Practices Implementation for Internal and External Customers
- Electronic Engagement Planning & Team Leadership, Facilitation, and Project Management
- Rapid Implementation with computerized process mapping & technology integration.

Clients (partial list)
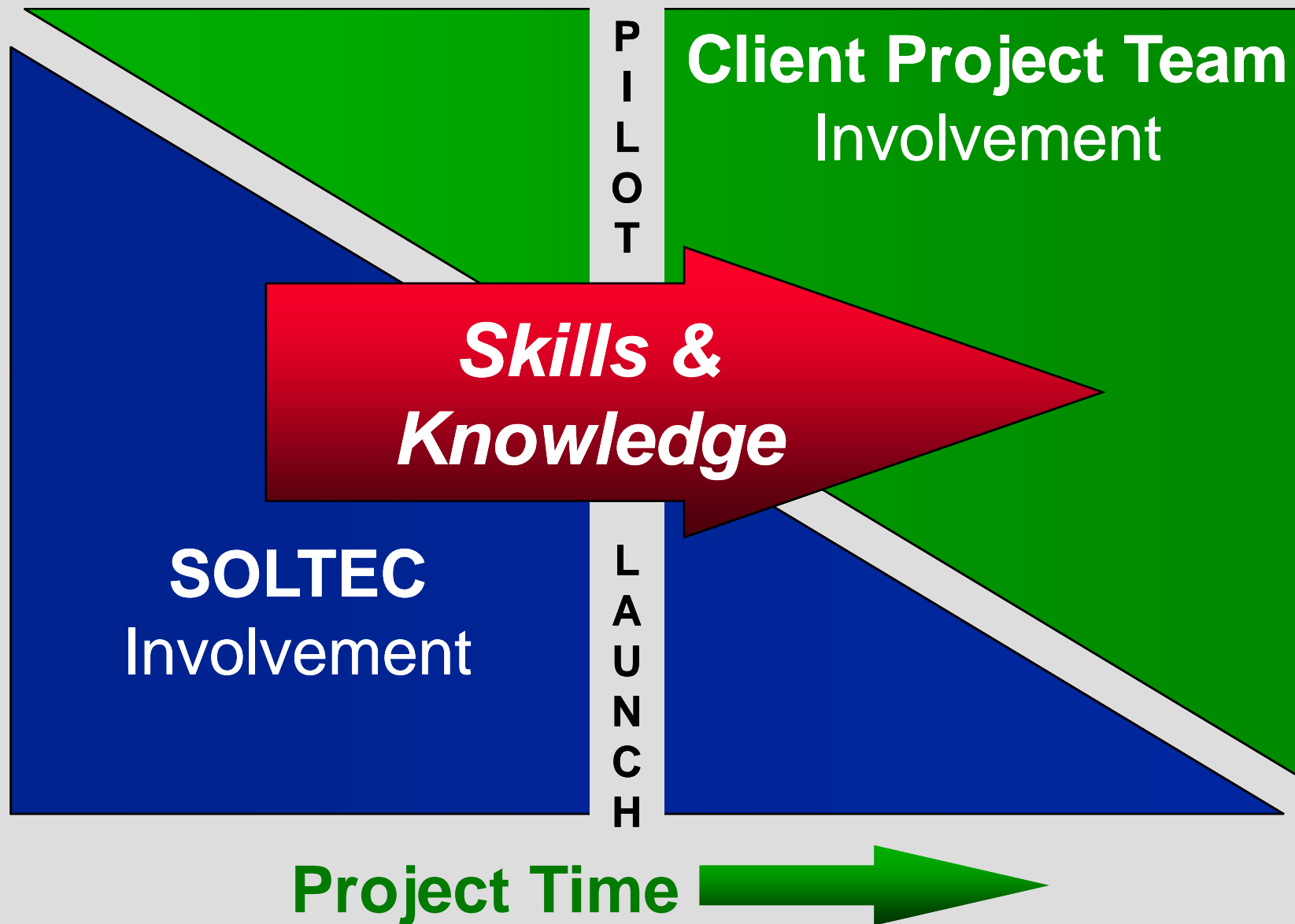
Team Work Expertise

- Client team partnerships are enhanced by our proven engagement techniques for facilitation and change management.

- We bring a structured and disciplined systematic approach to the client engagement process.

- We Use Electronic Document Templates to Capture Impacts, Changes, Decisions, Actions, etc.

- Focus is on Requirements to Achieve Proven Solution (not "What is the Solution?")

Team Meeting Agendas

MEETING LOGISTICS:

SUBJECT:	Operational Efficiency
DATE:	September 26, 2006
START TIME:	10:00 AM
END TIME:	2:00 PM
LOCATION:	Soltec Headquarters Troy, MI 48083

MEETING CONTEXT:

ACME Inc. has initiated a strategic objective to focus on identifying key processes to streamline and standardize operations throughout its group of US centers.
Paula Jones contacted Soltec, Inc., and subsequently Soltec was requested to demonstrate business processes, best practices and facilitation expertise for potential future project work at ACME Inc.
You have been invited to participate in an information exchange and evaluation meeting.

DESIRED RESULTS TOPICS	HOW TO ACHIEVE DESIRED RESULT	TOPIC LEADER	TIMING IN MINUTES
To have reached an understanding of existing operational practices at Tire Centers.	Tour center facilities in Ellenwood, GA and receive demonstration of key processes.	Bob Richard Paula Jones	60
To have reached an understanding of Tire Centers culture and history.	Review past and present issues and concerns.	Jason Rhodes	15

Action Items

BUSINESS PROCESS CHANGES ACTION ITEMS	ACTION OWNER	TIMING
1. Send Letter to Existing Suppliers Describing New Freight Term and Effective Date of 10/1/06	John Smith Purchasing	10/1/06
2. Change Existing Supplier Profiles to Reflect New Freight Term	Bill Jones Purchasing	10/15/06

SYSTEMS CHANGES ACTION ITEMS	ACTION OWNER	TIMING
1. Eliminate Prepaid and Add Freight Term from Supplier Set-Up Tables	Joe Brown Systems	11/1/06
2. Set-Up PO screen to default to Prepaid Freight Term	Joe Brown Systems	11/15/06

Best Practices Implementation

CURRENT PROCESSES → **PROVEN SOLUTIONS** → **NEW PROCESSES**

Procurement

Accounts Payable

Material Receiving

Order Fulfillment

Accounts Receivable

Financial Closing

Customer Service

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IMPLEMENTATION

Characteristics of a Efficient Process

- One Data Source Drives the Process
- Work is Performed Only Once with Accuracy and Timeliness
- Minimal Reconciliations
- Work is Done by the Individual with the Most Information and Expertise
- No Controls which Slow Down or Halt Process
- No Non-Value Added Tasks
- Process Outputs are Clearly Defined

Five Phases to Implementation

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Project Start Up	Process Impacts	Future State	Pilot Start Up & Launch	Full Implementation

PHASE ACTIVITIES

Team Work

PHASE DELIVERABLES

Team Outcomes

Five Phases to Implementation

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Project Start Up	Process Impacts	Future State	Pilot Start Up & Launch	Full Implementation

PROJECT START UP

- Perform Awareness/Education
- Initiate Competitive / Cost Analysis
- Charter Process Teams
- Develop Detailed Workplan
- Organize Project Team
- Project Team Orientation
- Initiate Gap Analysis

PHASE DELIVERABLES

- Education / Cost Analysis Provided
- Process Team Selected
- Team Charter Developed with Boundaries, Purpose, Decision-Making Method, and Team Results Defined
- Process Team Schedule Finalized
- Process Team Workbook Distributed

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Five Phases to Implementation

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Project Start Up	Process Impacts	Future State	Pilot Start Up & Launch	Full Implementation

PROCESS IMPACTS

- Review Current State Process in Affected Functional Areas
- Develop Preliminary List of Pilot Participants
- Identify and Understand Process Breakdowns and Constraints
- Assess Performance and Efficiency
- Assess Organization / Competencies
- Assess Information Technology

PHASE DELIVERABLES

- Current State Process Models
- Process Breakdown Summary
- Process Volume by Activity
- Total Process Costs
- Organizational Competency Summary
- Information Technology Analysis

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Five Phases to Implementation

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
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FUTURE STATE

- Review Best Practices
- Perform Future State Visioning
- Develop Business Practice Change Action Plan
- Develop Information Technology Implementation Plan
- Develop Internal Policies and Procedures
- Determine Objectives and Success Measurables
- Develop Value Proposition
- Assess Organizational Readiness for Change

PHASE DELIVERABLES

- Future State Process / Data Models
- Information Technology Implementation Plan
- Project Plan
- Communication Plan and Presentation Materials
- Measurables and Monitoring Program
- Organizational Effectiveness and Change Management Plan

Five Phases to Implementation

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Project Start Up	Process Impacts	Future State	Pilot Start Up & Launch	Full Implementation

PILOT START UP & LAUNCH

- Test Systems Changes and Adopt Business Practices
- Finalize Selection of Pilot Participants
- Finalize Guides and Communication
- Deliver User Documentation and Training Program
- Deliver Internal and External Presentations
- Execute Pilot
- Develop Pilot Participant Survey

PHASE DELIVERABLES

- Parallel Testing Monitoring Program
- Systems Changes Tested and Verified
- Procedures Documentation for Impacted Functional Areas
- Communication Package
- Training Guides and Presentation Materials
- Value Proposition Assessment
- Pilot Survey and Feedback

Five Phases to Implementation

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Project Start Up	Process Impacts	Future State	Pilot Start Up & Launch	Full Implementation

FULL IMPLEMENTATION

- Evaluate Program Results
- Refine and Modify Information Technology Changes, Procedures, and Training Program
- Conduct Gap Analysis
- Deliver Internal and External Presentations
- Deliver User Documentation and Training Program
- Develop Transition Plan to Manage Full Launch

PHASE DELIVERABLES

- Pilot Program Results Analysis
- Revised Procedures/Training Materials
- Communication Documentation
- Value Proposition Assessment
- Pilot Survey and Feedback
- Full Launch Transition Plan

Engagement Package Contents

Action Items	**Next Steps**	**Project Start-Up**
Agenda	**Process Flows**	**Systems**
As-Is Process	**Project Monitoring**	**Team Charter**
Internal Comm.	**Supplier/Customer Comm.**	**Team Workbook**

SOLTEC

Our Advantage

- We offer three distinct competitive advantages with respect to business process redesign:

Subject Matter Expertise

Disciplined Methods

Technology Solutions

Why do business with Soltec?

- Depth of experience in small, medium and large organizations
- Network of Subject Matter Experts
- Knowledge transfer to client
- Process and ROI focused
- Incorporate Change Management Techniques to ensure full implementation
- Cost Effective and able to implement quickly
- Principals directly involved with engagement
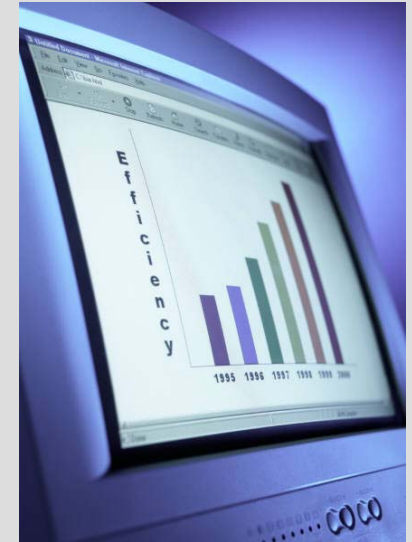
Business Process Implementation

Questions