

Five Step Needs Analysis

Step 1: What current tools and systems are you using?

(QuickBooks, Nice Label – shipping, Google sheets, Quality Software, ERP, CRM systems)

Step 2: What are the processes within your organization? *(IMM,*

Roll form, Extrusion, Mill, Coating, CNC, Assembly, Pack, Order Rec, Customer system interfaces, Logistics, Shipping)

Step 3: What are your biggest areas of pain? *(Missing visual data for*

decision making, Dashboards, linking assembly stations to print database, Cascading project lists from work cell to individual engineer, multiple disconnected spread sheets)

Step 4: What are your known opportunities? *(Visual plant gages for*

production and inventory demand, eliminate double entry, automate a task, integrate CRM info with financial forecasting models)

Step 5: Initial assessment and defined next steps *(Custom vs off the shelf, discovery time, agree to next meeting date and time.)*

We evaluate our discussion points and meet to review your personalized app suite solution.

Custom Solution

The original application your team had to have unique to you.

Freedom Tools

Customizable software developed for small to midsized manufactures.

Off The Shelf (OTS)

Pre-packaged existing software uses "as is" out of the box.

