# Webalo Implementation Questionnaire

# Supply Chain Inventory Management Projects

*The purpose of these questions is to get a clear understanding of the proposed business application required by the company, its functionality, and the measurements of success.*

## Supply Chain Inventory Management
- What is the scope of the inventory management, supply chain function at company?
- Does the company already have an ERP system and supply chain model? Is there more than one?
- Is the company using any warehousing or logistics solutions?
- What parts of the solution are already working well?
- What improvements is the company looking for?

## Business Objectives for Application
- What are the specific business objectives for this application?
- What business challenges will it solve?
- What are the application success criteria?
  - What is the expected improvement in knowledge, efficiency, transparency, time to market or other metric?
  - How will the company measure that the application is working effectively after it is deployed?

## Timeline
- What is the desired timeline for the solution?
- Is the company ready to get started immediately?
- Is the company considering phasing deliverables to address constraints in the timeline?
- What is the minimum required functionality that should be delivered in a first phase?
- What additional functionality needs to be delivered in subsequent phases?

## Target End Users
- Who are the end users of the applications?
- What role does each play in the supply chain inventory management application?
- Do different personas and roles need to see different information at different levels of granularity?  Can you be specific?

## Use Cases
- What are the use cases that need to be supported by the application?

- What data does the user need in each case?
- How does the data need to be visualized?
- What actions need to be taken after reviewing each set of visualized data, for example, drill downs, launching other tasks, updating other systems, or sending notifications?

## Required Application Functionality

- What are the top required application functionalities, workflows and processes that need to be provided by this application?
- Does the company have a written specification for the functionality?

## New Processes

- Will inventory processes change as a result of the new applications?
- What are the new processes that need to be supported?
- How will the new process work after the application is delivered?

## Data Sources

- What would be the ideal data source(s) for the information needed by the new application?
- Are these data sources in place and accessible now?
- Does the company already have a general DB platform like SQL Server, Oracle, MySQL or other DB that can be utilized to be a new data source for the new desired functionality?
- Will the company write custom DB procedures or REST services to support the desired workflows?
- Is the company investigating any 3rd party applications to support the new business functionality?
  - Is there a short list?
  - Has one been selected for use?

## Questions Specific to Inventory Management

- What inventory information is currently used for the existing inventory process?
- What is the company's specific manufacturing and supply chain process?
- What systems are used to track the inventory at each stage of the process? Where is the data created, stored and updated?
- For each relevant process and SKU how does the company track:
  - The total number of items manufactured or at the start of process?
  - The number of items delivered to warehouses and depots?
  - The number of items and SKUs on homogenous or mixed pallets?
  - The number of shipping units or pallets available and ready to be shipped?
- Is there a shipping manifest associated that ties the customer account, inventory and delivery point together?
- What other electronic, label or paperwork needs to be generated to be able to control the movement of product through the chain?  What are the controls and signoffs required on these documents or records?

- How many pallets have been loaded on trucks? Delivered? Accepted? Rejected? Returned? Transferred to other locations?
- How many staff perform inventory operations in the field? In the depot? At the retail stores?
- Are the staff performing inventory operations company employees, 3rd party contractors, temporary workers, or others?
- Is new product scanned into inventory on shipment, on delivery?
- Is there a routine inventory process for restocking or reordering?
- When inventory is performed is counting done by individual items or in bulk per SKU?
- How is product waste or spoilage handled from an inventory perspective?
- How is product removed from inventory at customer on-sale of the item?
- How are sales reconciled with inventory?
- How does information from warehousing, logistics and inventory systems get passed to business and accounting systems?
- Does the company's retail customer request inventory information from the company on a periodic basis?
- How would you prioritize the best candidates for improvement?

## Application Delivery, Access and Usage

- Will users need to be logged into a tracking system as the application is used to capture information about user performance (metadata) in addition to capture of company required data? How does this data factor into the success criteria?
- How is a user identified? Are there unique IDs, email addresses that need to be coordinated with other systems?
- Do employees share devices/scanners – e.g. select one from a pool on the job site?
- Do users have the skills to load applications on their devices?  Will they be allowed to?
- How will users be trained to use the applications?
- Does the application need to be geo-fenced for the job sites?
- How many shifts need to be supported?
- What is the estimated total number of users that will receive this application?
- What is the estimated concurrent user load on the system?
- What is the estimated number of transactions/interactions per 8-hour day by the user?
- What is estimated maximum transaction rate for the application?
- What fraction of the day can the user count on being online either on carrier or Wi-Fi networks?
- If offline for large periods of the day, what is the estimated number of transactions that need to be stored until connectivity is available?
- Does the user need to access company reports offline?