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Engineered to Order Pump Manufacturer

Non-Conforming Materials / Quality Problem: 15% Part Reject Rate Put Deliveries to Key Customers At Risk

Extremely Complex Manual Process, Mapped As-Is, Designed To-Be, Workflow And Advanced SharePoint Application Developed Within 60 Days.

81 Step Process Mapped, Reduced to 46 Steps in 60 Days

“No-Code” Solutions with SharePoint and Other Tools, Plus Process Improvement Techniques Yield Rapid Results – Business People Created Their Own Systems – Did Not Wait for IT Department

“Visual Manufacturing” Dashboard Helps Line Management Monitor Difficult Problems at a Glance

The Bowling Alley: 100+ No-Code Applications and Solutions Identified for Engineered to Order Manufacturers

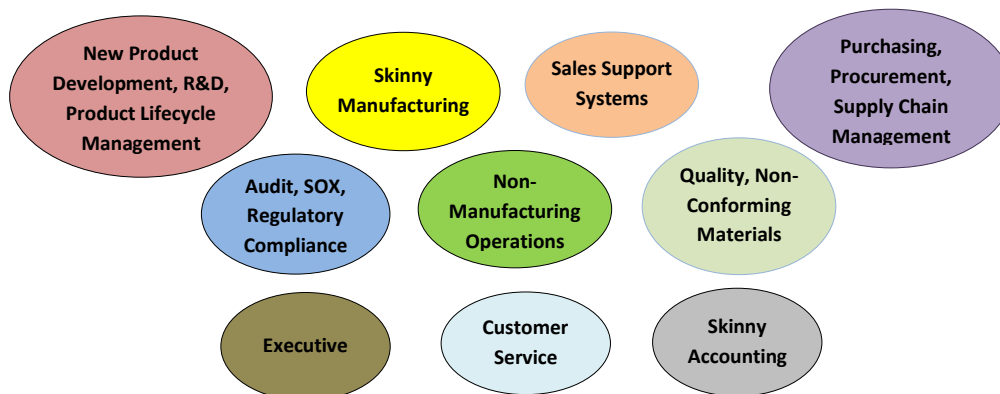
By Tom Ingram, PMP, CMC(e)

This client was suffering with a 15%+ reject rate for parts delivered to their plant from subcontractors. While several factors were beyond the team’s control, including owner family difficulties, we helped the team focus on what they could do something about – and made astonishing progress in just 60 days. What follows are some items illustrating how

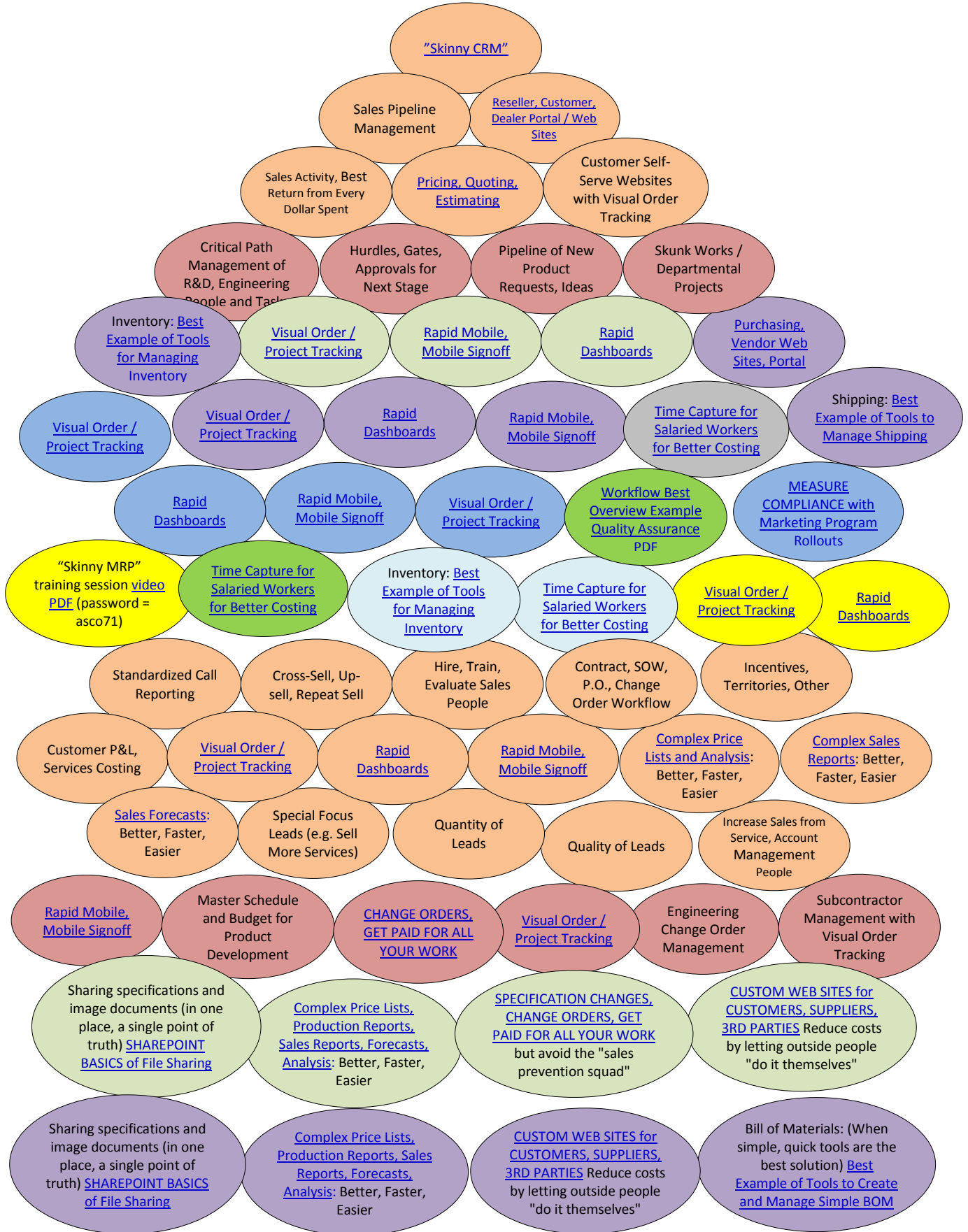
the progress was made and numerous additional no-code solutions that were identified for this and other engineered to order manufacturers. Due to problems beyond the team and our control the full solution was not implemented immediately but much can be learned from these rapid solutions.

The “Bowling Alley” of No Code Solutions

Color Code:



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Complex Price Lists, Production Reports, Sales Reports, Forecasts, Analysis: Better, Faster, Easier

Sharing specifications and image documents (in one place, a single point of truth) [SHAREPOINT BASICS of File Sharing](#)

CUSTOM WEB SITES for CUSTOMERS, SUPPLIERS, 3RD PARTIES Reduce costs by letting outside people "do it themselves"

Bill of Materials: (When simple, quick tools are the best solution) [Best Example of Tools to Create and Manage Simple BOM](#)

Flowserve Case: Our Best Example Estimated savings of \$350,000+ per year for SOX Compliance using multiple tools

Use SHAREPOINT BCS to get data from Oracle, SQL Server and other large databases [Video Example 1](#) [Example 2](#)

Complex Price Lists, Sales Reports, Forecasts, Analysis: Better, Faster, Easier

CUSTOM WEB SITES for CUSTOMERS, SUPPLIERS, 3RD PARTIES Reduce costs by letting outside people "do it themselves"

Complex Price Lists, Sales Reports, Forecasts, Analysis: Better, Faster, Easier

[Costing: How do we get better COST / PROFIT INFO ON HIGH VALUE SERVICES AND PROJECTS?](#)

[Performance Management Problem Person Example](#) (password=asco59)

BEST OF THE BEST: See 1/0 Sales Self-Management System

[Territory and Named Account Management:](#) Better, Faster, Easier

[Commissions and Compensation Administration:](#) Better, Faster, Easier

Order Status Visual Tracking for Parts Example [CLICK HERE](#) (password=asco61)

[Job Definition and Performance Evaluation](#) (password=asco18)

Inventory: [Best Example of Tools for Managing Inventory](#)

Purchasing: [CUSTOM WEB SITES for VENDORS TO SUBMIT QUOTES](#)

[CHANGE ORDERS, GET PAID FOR ALL YOUR WORK](#) but avoid the "sales prevention squad"

Measure and reward the [RIGHT SALES ACTIVITY](#) (Pipeline management, reporting activity against standards)

Advanced Reports for Top Execs: [Reporting on the RIGHT LEADING INDICATORS with SHAREPOINT](#) (instead of lagging financial reports)

CUSTOM WEB SITES for YOUR CUSTOMERS: Increase sales, reduce costs by letting customers "do it themselves"

[CONTRACT APPROVAL, STATEMENT OF WORK](#) system that provides necessary controls but avoids the "sales prevention squad"

CRITICAL SERVICE OVERSIGHT: Stop wasting sales time making sure customers get what they were promised

[Bid / Proposal / Quote systems](#) that provide necessary controls but avoid the "sales prevention squad"

[CHANGE ORDERS, GET PAID FOR ALL YOUR WORK](#) but avoid the "sales prevention squad"

[Costing: How do we get better COST / PROFIT INFO ON HIGH VALUE SERVICES AND PROJECTS?](#)

Special Problem: Part Time Sales / Part Time Customer Service People - How to capture their time and measure performance [RIGHT SALES ACTIVITY](#)

Measure and reward the [RIGHT SALES ACTIVITY](#) (Pipeline management, reporting activity against standards)

Work Flow / process flow for logging manufacturing defects, the solution and making sure the solution is added to documentation, procedures and training (to prevent recurrence) [Work Flow Process Flow Chart](#) (password=asco59)

DASHBOARDS, Advanced Reporting [Reorder Point Dashboard Simple Complex video Reorder Point Dashboard Simple Complex PDF Complex Example PerformancePoint PDF](#) (password=asco59)

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[CONTRACT APPROVAL, STATEMENT OF WORK](#) system that provides necessary controls but avoids the "sales prevention squad"

Revenue Recognition Example - Solved with SharePoint [Video Example 1 Example 2 Example 3](#) (password = asco59)

Advanced Reports for Top Execs: [Reporting on the RIGHT LEADING INDICATORS with SHAREPOINT](#) (instead of lagging financial reports)

Reconciliations with Excel: Use SHAREPOINT Instead [Video Example 1 Example 2 Example 3](#) (password = asco59)

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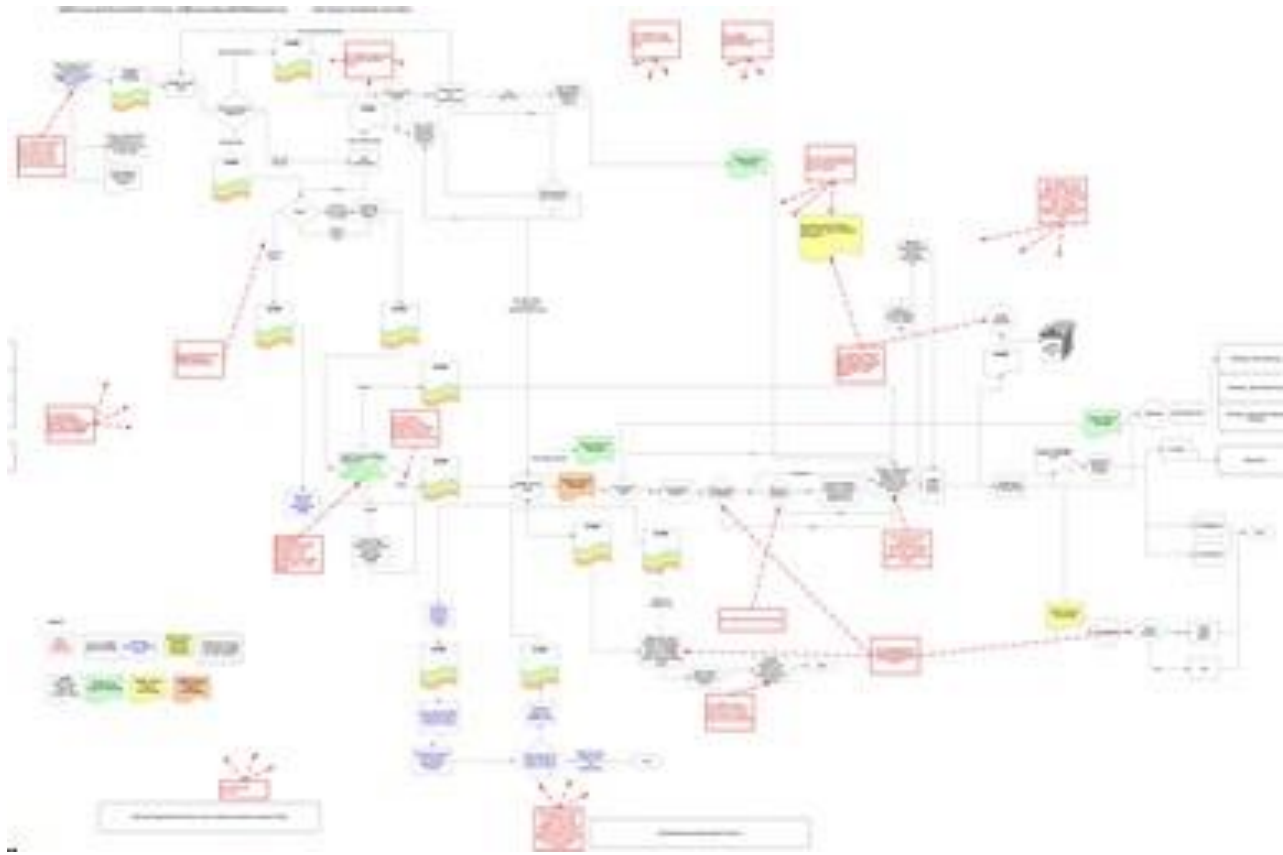


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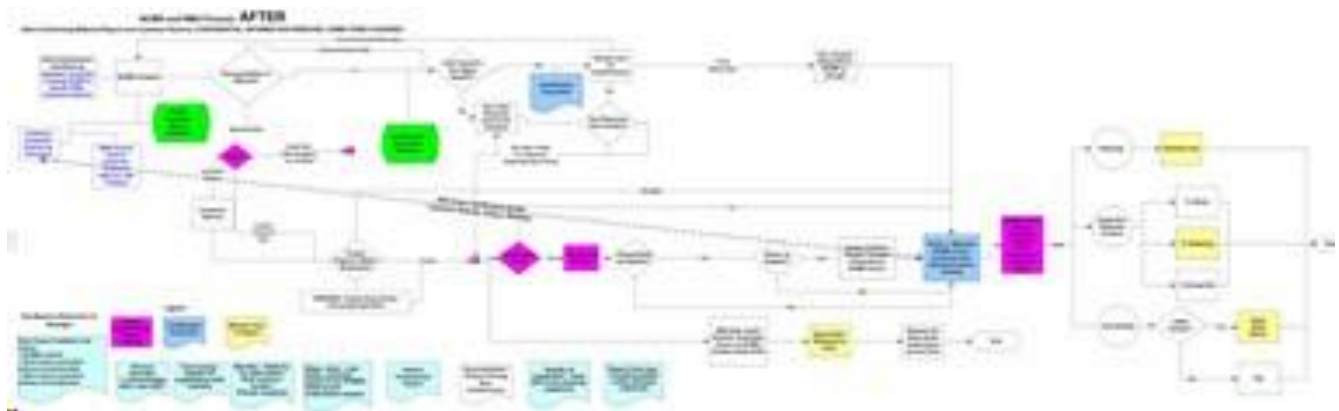
Concepts, Solutions, Illustrations, Examples

Click on the links below for examples...

[-BEFORE process map](#)



[-AFTER process map](#)



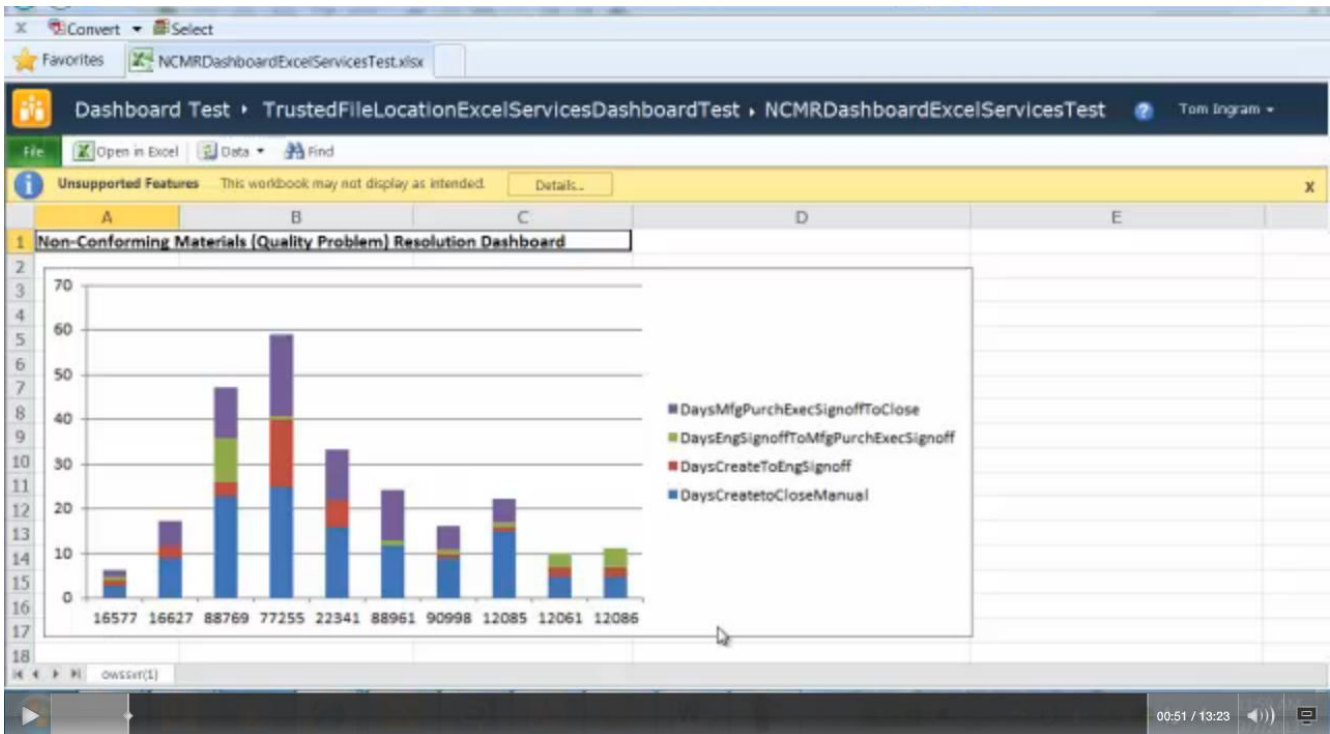
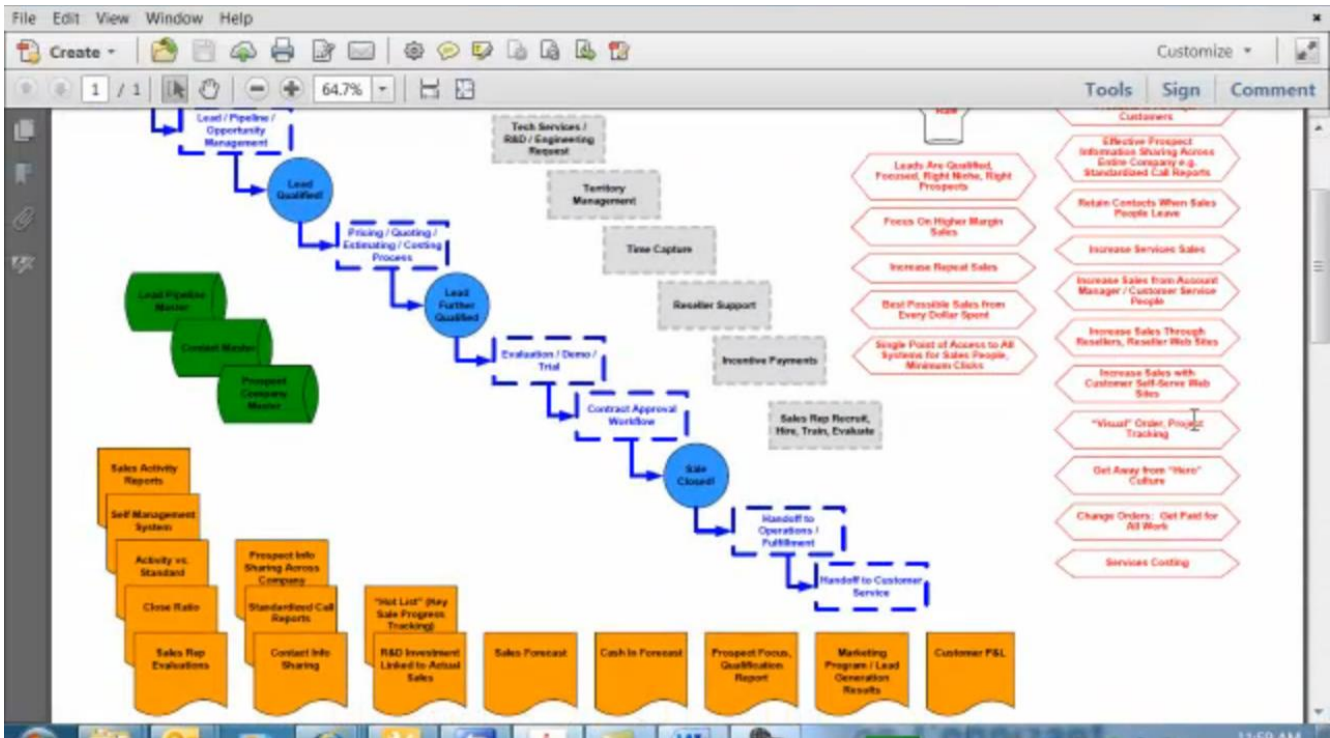
[-Electronic Form Created In 30 Days](#)

[-Dashboard Visual Quality Problem Tracking](#)

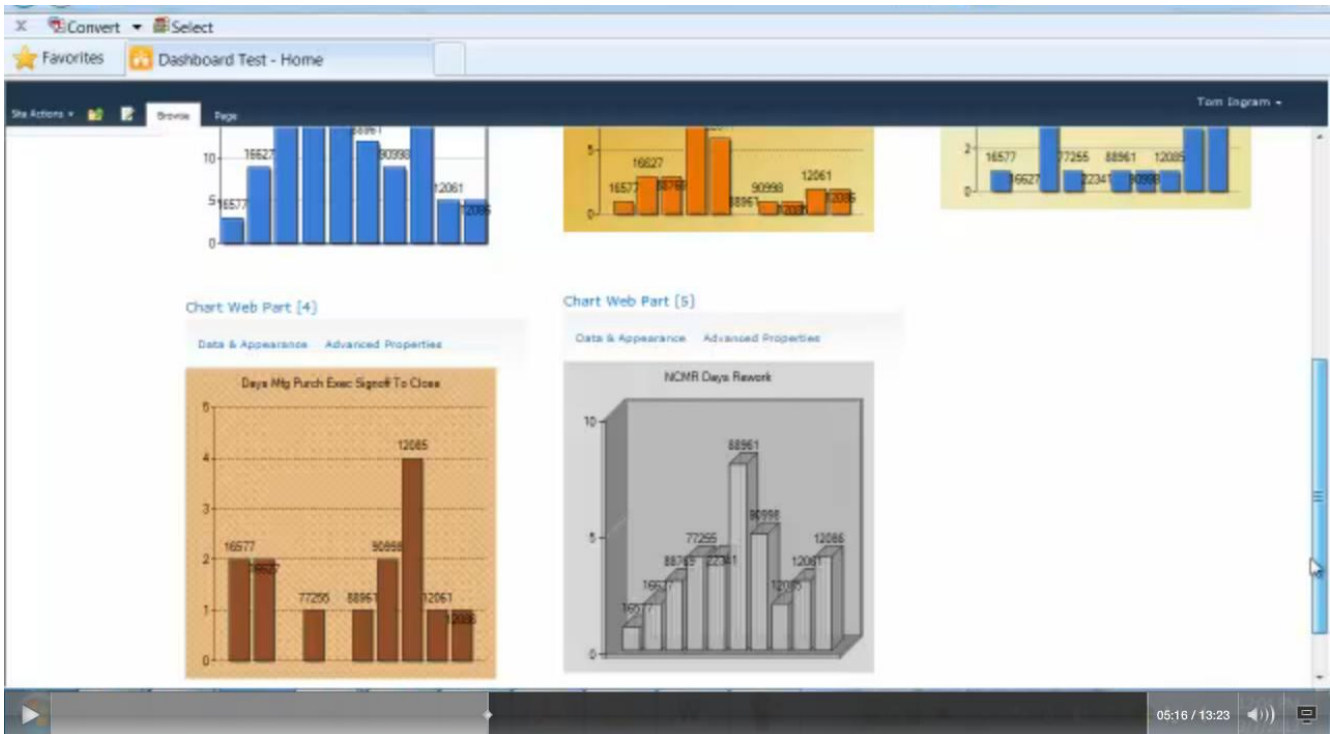
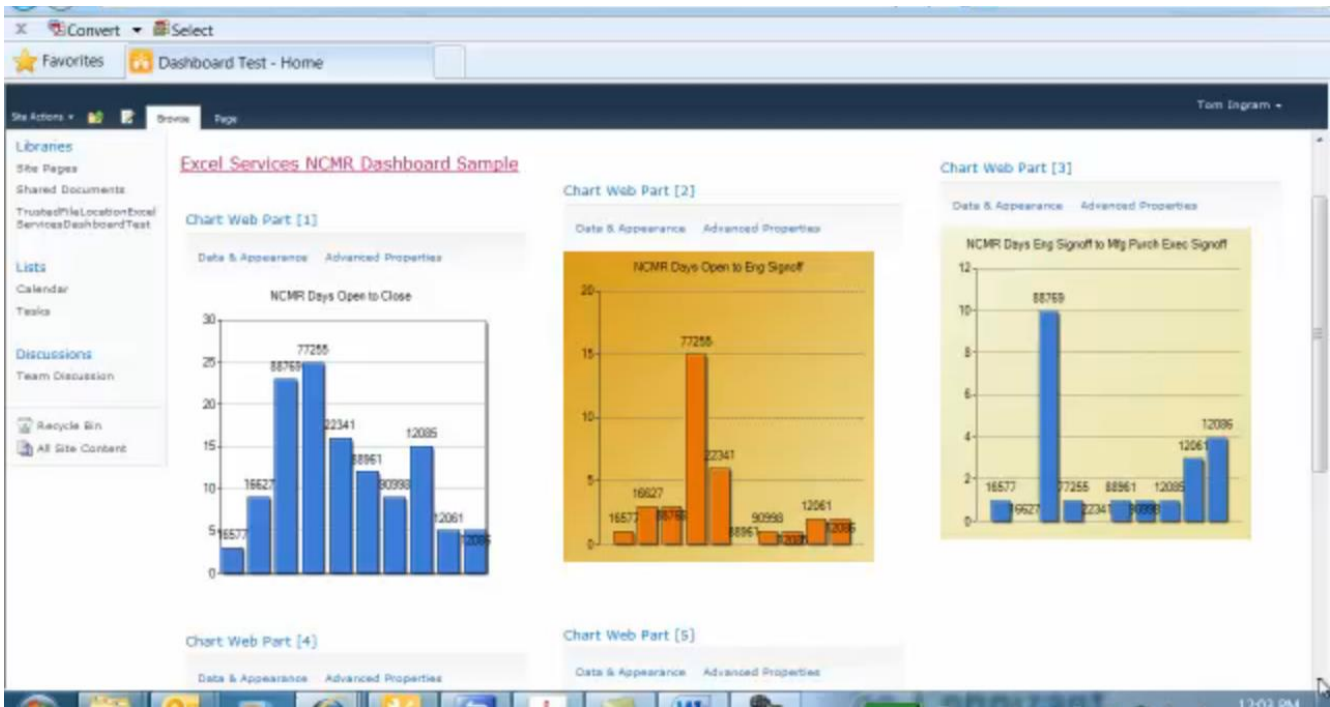
[-Extensive Use Cases](#)

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Dashboard



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The “No-Code Solutions” Key Principle: “First, Try to Solve the Business Problem with “Excel on Steroids”.

I train business users to think of SharePoint as Excel on steroids. By attempting this approach to meet the business need first, several benefits arise:

- **1/3 of business problems will be successfully solved**
- **1/3 will result in defined processes, outcomes and prototypes for more advanced IT solutions**
- **1/3 of requests will go away on their own**
- **Prevents conventional IT problems: Scope creep, “we can program anything”, lack of user participation, undefined and continually changing processes, big bang approach to problems, lack of executive sponsor.**

** Success stories, client quotes and payback estimates are provided as general illustrations of past performance and represent summaries of long term, complex efforts. They are often used to teach concepts and lessons learned, and may have been simplified considerably. Estimates of financial impact are estimates only, and not intended to convey exact financial information. Some have been altered to protect confidential information. We ask that prospective clients contact our references and request specific details of relevant success stories prior to any decision to use our services.*