NexTec Group

Customer Optimization Services

Presented by:
- Dan Reilly – Customer Account Manager
- Jennifer Spanos – Head of Vertical Business Solutions
- Brian Williams – Professional Services Manager
Agenda

Today’s topics

• Current climate
• Optimization
• Documentation Services
• Audits
• BI
COVID Experiences

- Rapid staff acquisition
- Basic and cross training
- Onboarding
- Remote work environment
- Supply chain challenges
- Cash flow
About NexTec

An award-winning business technology consultancy

ERP, CRM, BI, cloud and on-premise solutions for small and mid-sized businesses

Over 600 customers nationwide across multiple platforms

Industries:
• Food and beverage
• Agriculture
• Cannabis
• Pharmaceuticals / nutritional supplements
• Chemical
• Medical device

Doing business in
12 countries
10 Canadian provinces
and 50 US states

Acumatica, Microsoft,
Sage and Salesforce
customers

Established in
1994
600+

25+
years helping
mid-sized business
with ERP, CRM
and BI software

95%
annual client
retention rate

50%
of clients
chose NexTec
after working with
another provider
Professional and Technical Services

Professional Services

• Project Management
• Business Requirements Analysis
• Business Consulting
• Compliance Consulting
• Validation Services
• Education Services
• Business Process Documentation
• Business Scenario Development
• User Operating Procedures / Work Instructions
• End-User Training
• Post Implementation Optimization

Technical Services

• System Admin Training
• Toolset Training
• Data Conversion Assistance
• Business Intelligence Assistance
  • User-Defined Inquiries
  • Business Statistics
  • Dashboards / Portals
• Application Customization
• Remote IT Assistance
• Technical Health Check
Optimization

Business Case

- Continuous improvement process
- Implementation holdovers
- Efficiency gains
- Decision support mechanisms
- Shifting markets / customer / regulatory environment
Inventory Control

- Huge YEI variances highlighted need for improved processes and controls
- Dysfunctional storage
- Imprecise production outputs
- Minimize on-hand & stale inventory to allow breathing room and improve standardized material flow

Requirements Planning

- MRP & MPS calculation improvements based on signed SOs and scheduled WOs, as opposed to wide open Sales Order demand
- Flatten work orders of multi-level BOMs by leveraging phantoms & by-product functionality
- Pre-pick & stage materials per work order to ensure no production interruptions as a result of material availability
- One work order per production run, with minimal exceptions

Improved Standards

- Reduction/standardization of severely fragmented raw material offering to reduce complexity and more accurately apply costing models
- Revision of labor standards from product feature centric routings to operationally reflective and easily updatable routings and associated labor standards
Optimization Steps
Project Execution and Timing

Assess
- Interview key stakeholders
- Examine best practices
- Define overhead and goals
- Develop project plan

Build
- Proof of concept
- Concept validation
- Development
- Pilot & test

Deploy
- Go live
- Cutover tasks
- Support and more training
- Access
COVID Experiences

• What are your experiences from shifting work force requirements?
• Not an easy or anticipated shift, difficult times with proximity processes
• How do suppliers get paid?
• End elements of procure to pay are often not optimized
  • Matching
  • Payment Authorization
  • Banking Transfer
Rapid Banking Automation

• Consider ACH or EFT standard for transmission
• Standardized file transfers for US and Canada
• NexTec product for ACH or EFT licensed
• Service offering for implementation and supporting communication
Other X3 Offerings

• Quality Control, with or without Procession
  • Store Analytic data related to quality
  • Communicate to stakeholders, automate processes

• Fixed Assets
  • Implement Sage X3 Fixed Assets module
  • Add value by streamlining accounting functions monthly

• Document transmission

• Cash management applications
Documentation Services

- SOP creation
- Training Guides / Videos
- Work Instructions
- GMP and other regulatory compliance
- End User Training documentation
- Extended role-based release notes

Sample Documentation

Be Prepared to Handle Product Recalls Before They Occur

Handling a product recall is a very challenging task. At bare minimum, customers are inconvenienced, while a company’s bottom line takes a hit from having to fix the problem and compensate irate consumers. If the Food and Drug Administration or Department of Homeland Security mandates the recall, the stakes are far greater.

Is Your Business Prepared for a Product Recall? Let NexTec Group’s ERP Software Come to the Rescue!

Handling a product recall is a very challenging task. At bare minimum, customers are inconvenienced, while a company’s bottom line takes a hit from having to fix the problem and compensate irate consumers. If the Food and Drug Administration or Department of Homeland Security mandates the recall, the stakes are far greater.

It’s important to have a product recall strategy in place BEFORE you face a recall, or your company could be in serious trouble. ERP, CRM and BI software can have a great impact on simplifying the steps involved in planning and executing product recalls. Here’s how:

Consumer Issue Management is made easier

Users can designate a recall or support category based on the scale of the problem automatically. Any notes and issues are easily logged and are accessible to key members of the company that may need to handle the recall.

Fast resolutions

In product recalls, time is of the
Audit Services

• System and business process audits fit to your business
• Address gross deficiencies or fine tune
• Root cause analysis for broad business practices
• Continuous improvement methodologies
• Financial, operational and technical
Business Intelligence

- Accelerate financial forecasting and control
- Budgeting
- Insights on cash flow
- Efficiencies based on data
Recap
How to contact us

• We want to hear from you, let us help!

• Contact your PM

• Email directly
  • dreilly@nextecgroup.com
  • jspanos@nextecgroup.com
  • bwilliams@nextecgroup.com