

REALTRAC
SHOP MANAGEMENT SOFTWARE

**Implementation
Kickoff**



Agenda



1. Introductions and Roles
2. What is your current process
3. Planning for a successful transition
4. Implementation logistics
5. Anticipated challenges

REALTRAC

Realtrac Support Roles



We will provide seamless implementation and training to ensure the platform immediately supports your business goals.

Account Manager

- Client account management
- Support client growth initiatives with additional products
- Client subscription renewal and ownership package
- Additional modules and client purchases

TBD

Technical Support

- New System Installation
- Accounting Software Integration
- Data Importation
- Report Customizations

TBD

Training Support

- New client training
- Continuing training services
- Development request processing
- Application best practices and principles consultation

TBD

Business Support

- Strategic guidance to meet your goals
- Labor, machine and overhead costs consultation
- Business best practices & principles consultation
- Client account billing and support

TBD

Your Team's Roles



Tell us about your team.

Primary Contact

- Attends all meetings
- Completes all project plan tasks
- Manages internal stakeholders
- Train end users

TBD

Executive Sponsor

- Approves content and company policy & procedures
- Approves financial decisions
- Data Importation
- Champions the system roll-out internally

TBD

Other Stakeholders

- Additional people completing implementation action items

TBD

What Is Your Current Process



We want to learn about your company to better recommend best business practices with Realtrac, as well as develop a training plan tailored to your business needs.



Understanding your flow of business from initial job entry to job finish and invoicing



Determine work groups or departments



Understand your management and employee responsibilities



Review shop floor workflows and practices



Understanding inventory, purchase order, BOM and invoicing processes

Planning For A Successful Transition



We want to learn about your company to better recommend best business practices with Realtrac, as well as develop a training plan tailored to your business needs.

- Appoint a primary contact and go-to for your employees
- As with any sophisticated ERP system, there is a learning curve. Establish in-house user groups with weekly checkpoint meetings.
- Discuss success and opportunities for growth to assist in accelerating user effectiveness
- Build your office and shop floor processes to maximize complete and accurate data into Realtrac as workflows through your operation. This starts with work planning; creation of routers and continues to the floor login protocols for access of job reviews and future related jobs
- Create weekly job review meetings with teams. Formal agenda should include: Discuss key jobs, review summary performance of all jobs, focus on winners and losers and know why each happened. Record action items to review in the next meeting
- Communication! Communication! Communication!



REALTRAC
SHOP MANAGEMENT SOFTWARE

**Implementation
Logistics**



REALTRAC

Strategic Kick Off Call

- Introductions and establishing team roles
- Review your company and current business practices
- Overview of implementation tasks
 - Software installation
 - Training
 - Go-Live
- Establish and agree on timeline dates

Installation & Setup

- Realtrac Software
 - Server PC
 - Client PC's
- Data setup and Work Center configuration
 - Integrate accounting software (QB, Sage)
 - Import customers/vendors, inventory, estimates/jobs, and BOM's
- Labor, Workstation, Work Center and Overhead Costing review and setup
- Assist with customizing reports

Training and Resources

- Complete scheduled training plan
- Review website account login for Realtrac knowledgebase, links to training & help articles

Go-Live & Support

- Begin Processing Jobs on Shop Floor
- Ongoing training and Q & A

YOU



Strategic Kick Off Call

- Prepare your current process discussion points
- Prepare list of questions for the Realtrac team
- Record content to complete any action items

Installation & Setup

- Prepare the PC's with necessary configurations outlined in the Technical Preparation Checklist
- Accounting software administration logon
- Complete Realtrac Import Templates
 - Customer/Vendor
 - Inventory
 - Estimates/Jobs
- Prepare a list of Workstations, Work Centers and Employees

Training Schedule

- Prepare employee training schedule
- Establish practice estimates, jobs, purchase orders and inventory transactions
- Study employee, work Center and workstation rates to confirm validity outlined in the provided worksheet.
- Train machine operators thoroughly on job login/out

Go-Live & Support

- Preparation
 - Plan transition for end of day/week
 - Close as many jobs as possible
 - Complete and post open financial transactions
- Contact Realtrac technical or training support with questions or issues

Week 1

- Software installation and Setup with Realtrac Technical Support
- Training Overview with Realtrac Training Support
 - System Setup
 - Employee Setup
 - Work Center and Workstation Setup
- Complete Labor, Workstation, Overhead Costing setup

Week 2

- Review and recommend business practices with Account Executive and Training Support
 - Flow of business groups and departments
 - Management and employee responsibilities
 - Shop floor workflow and practices
- Training on Estimates and Job groups
 - Building routers, scheduling, etc.
 - Interactive training entering new estimates and jobs

Week 3

- Training on Inventory Group / Purchase orders / BOM's
- Training on Shop Floor / Work Sessions
- Training on Inventory group

Week 4

- Training on Invoice group / Quality Group and non-conformances
- Interactive training, costing and closing jobs

Week 5

- Training on MRP / Loading / scheduling jobs
- Hands on training, walk through jobs from start to finish

Encountering Roadblocks

Common Challenges

- Allocating time and resources to work on this project
- Employee resistance to change and of possible additional duties
- Unrealistic expectations of the transition and learning process
- Changes to existing business practices

Possible Challenges

- Rebuilding shop floor processes and workflows
- Inadequate employee flexibility in overall project plan
- Lack of communication between departments
- Insufficient investment in technical infrastructure

