Prevail Implementation Guidelines

This guide outlines what is required from the client to successfully implement Prevail in a typical sales region. These needs include a defined implementation scope, identified prerequisites, assigned roles for key personnel and a broad understanding of the necessary time commitments for those roles across the entire implementation process.

Areté defines a typical region as a single plant system, producing 100-150 products, supplying four to eight warehouse locations. This system would support standard Areté API feeds for weekly sales, customers and master data and is supported in a LAN environment by personnel versed in the basics of sales forecasting. Actual implementation timeline and plans will vary (sometimes significantly) based on local client needs and must be thoroughly considered when defining the scope of the implementation.

Scope

The first consideration when planning a Prevail implementation is the definition of its scope. The implementation Sponsor (see **Roles**) should address the following questions when determining the project scope.

Will Prevail be implemented as a market-based or location-based forecasting system?
How many software installation locations will be required?

What technical platform will be used to best meet business requirements? (*Standalone, file servers, application servers*)
Can the IT group produce API data that contains accurate restated sales history by item for all locations for the most recent week?

Required Roles

There are five roles or functions involved in the implementation and ongoing running of Prevail. Each role has responsibilities described in the following Implementation Steps.

Organizational Sponsor	The Sponsor is the client's project champion; responsible for ensuring clarity of project objectives, availability of proper resources, clearing any roadblocks and maintaining project visibility with senior management.
Operational Process Owner	The Process Owner is responsible for the overall implementation and ultimately for the forecasting accuracy of the system. His or her job is to assess the current situation, assign roles, expedite steps, coordinate training, etc.
Demand Planner	The Demand Planner is responsible for loading the Prevail database during Prework, entering the feature and exception calendars and generating forecasts and reports.
IT Process Owner	The IT Process Owner is responsible for creating the required API parcels and installing and supporting the required hardware/software. They must also ensure that remote support is reliable and appropriate data recovery procedures are in place.
Areté Inc	Areté supports the entire implementation process and trains all users.

Prerequisites

From the project scope a number of implementation prerequisites are identified. These prerequisites must be in place within your organization prior to the actual implementation work conducted on-site by the Areté Implementation Team.

Scope Agreement	All stakeholders must agree to the scope of the implementation project.

Organizational Commitment	The Sponsor must ensure alignment within their organization to the implementation project.
Defined Planning Process	Upper management must have vision of the current and future planning processes for sales forecasting. That is, there must be significant thought given to process analysis - how will the organization gather weekly forecasts. In short, this process helps answer the question: Do the various functions within the company understand their roles and how they must support this process?
Identified Resources	The following must be identified prior to implementation:
People	The Sponsor must assign staff members to the implementation roles and budget the necessary people-days, according to the guidelines set in the **Resource Estimate** section.
Systems	The following equipment must be purchased (if necessary) and installed, according to their appropriateness with regards to the project scope and to your IT platform and infrastructure: network server, workstations for process owner and scheduler(s), sufficient network bandwidth to handle any proposed file transfers, modems, printers, etc.
Workspace	During on-site implementation, Areté consultants need dedicated office space with access to phones and proper network connections. Additionally, both meeting and training areas are required to facilitate those activities as needed.
Data	Areté requires a current copy of the working data from your existing system to ensure the availability of sales records (at minimum, one year's worth), products and customers.
Remote Support Connection	Remote Support software, such as pcANYWHERE, must be purchased and installed on a networked workstation. Areté requires this software to provide remote support to our clients, as per our Standard Maintenance Agreement.

Phases

The entire Prevail installation process begins with an **Evaluation** phase, where client-specific objectives are determined and the business negotiations (estimates, contracts, etc.) take place. From there the process moves into the next phase, **Implementation** (described below), before entering the final phase, **Live**, where Prevail is run as the client's forecasting system with remote support from Areté.

Within the **Implementation** phase, there are three phases:

1. Prepare	Define, create and inspect API parcels; define inter-location connectivity and develop an implementation plan.
2. Prework	Install hardware and software, Prework training, load master data, test API parcels.
3. Start-Up	Complete initial user training, enter initial working data, run Prevail in parallel with legacy systems and complete system acceptance.

The implementation process requires that the Sales Settlement or Tracking system create API parcels (Customers, Master Data, and Weekly Sales History) to be merged into Prevail. The amount of custom work, if needed at all, in a Prevail implementation is usually very small. For a standard installation, you can expect a rather short timeline (4 to 10 weeks). The timeline is ultimately dependent not only on the amount of data to be merged and the level of feature history desired prior to start-up, but also on the availability of resources. This all needs to be considered while developing the Implementation Plan.

Resource Estimate

This resource estimate is based on the Areté-defined typical installation scenario: a single plant system, producing 100-150 products, supplying four to eight warehouse locations. This system supports standard API feeds that require little custom work and is run in a LAN environment.

Please note that the time estimates in the following table for all client roles (Sponsor, Process Owner, Demand Planner and IT) are *NOT* considered to be full, eight-hour days. Rather, these estimates are calculated as six-hour days to account for daily job functions that cannot be suspended during implementation. Also, the day calculations for Areté include both on-site *AND* off-site days.

Time/ Tasks	Sponsor	Process Owner	Demand Planner	IT	Areté Inc
Stage One: Prepare (1 to 2 weeks)					
Time	1 day	3 days	3 days	3-8 days	3-5 days
Tasks	Ensure: Planning processes in place Resource availability Funding availability Sr. Mgt. visibility Roadblocks cleared	Complete Functional Questionnaire Complete Technical Questionnaire Organize Team Establish Forecasting Groups Develop Project Plan with Areté	Complete Functional Questionnaire	Complete Technical Questionnaire Define Inter-Location Connectivity Plan Specify API Formats Create API Parcels	Specify Hardware / Software Requirements Specify API Formats Establish Market Groups Develop Project Plan with Process Owner
Stage Two: Prework (2 to 4 weeks)					
Time	1/2 day	3 days	4-7 day	3-5 day	5-7 day
Tasks	Ensure: Roadblocks cleared Resource availability Sr. Mgt. visibility	Manage project Prework Seminar (optional) Communicate with users	Complete System Prework Prework Seminar	Install Software Perform network test Validate API Establish Inter-Location Connectivity	Install Software Establish Inter-Location Connectivity Validate API Prework Seminar Validate Prework
Stage Three: Start-Up (1 to 4 weeks)					
Time	1/2 day	4 day	8-12 days	2-3 days	7-10 days
Tasks	Ensure: Resource availability Sr. Mgt. visibility Roadblocks cleared Acceptance	Start-Up System Operational Seminar Identify & resolve issues Acceptance	Start-Up System Operational Seminar System testing Acceptance	Start-Up System Technical Seminar Acceptance	Start-Up System Advanced Forecasting Seminar Technical Seminar System testing Acceptance
Total	**2 days**	**10 days**	**15-22 days**	**8-16 days**	**15-22 days**