



Progress Report

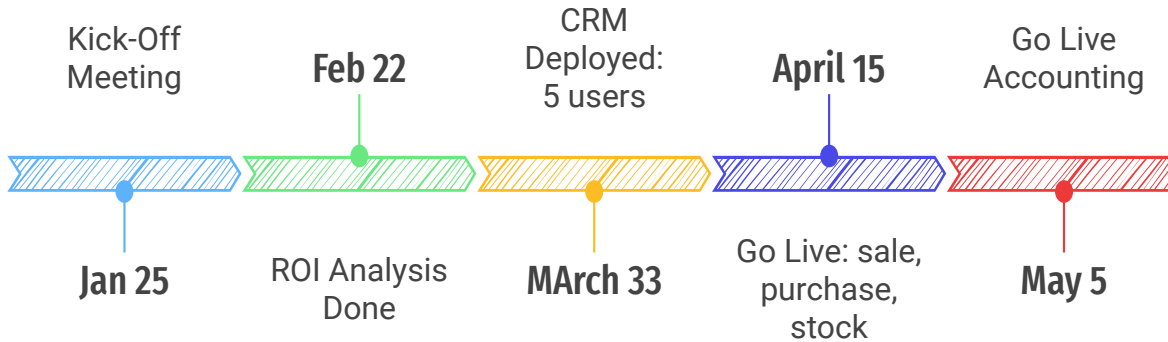
December 2020

01

What has been done?



Timeline



Initial Budget:

200h - 16,500€
(phase 1)

Time Spent:

157h

Maintenance:

1,000 lines of code
160€ / month

Initial Scope:

25 users - 12 Apps

In Production:

18 users - 11 Apps

Project Status

- Purchase: **Deployed**
- Stock : **Deployed**
- Sales : **Deployed**
- Accounting : **In Progress**
 - Invoicing: **Ready**
 - Bank: **In Progress**
- Marketing : **On hold**
- HR : **Cancelled**

--

Note:

- Make sure accounting department is properly onboarded, the decision-making process should be smoother;
- Marketing postponed to after [EventAAA]

Deployed: Deployed and used by end-users.

Ready: Completed and validated but not deployed in production yet, waiting for the green light to move forward.

In Progress: Implementation still in progress. Remaining steps before deployment: validation and end-users training.

On Hold: Scope postponed to a later phase.

Cancelled: Scope removed from the project scope.

People Adoption

- Accountant: **In Transition**
 - Sales Manager: **In Transition**
 - Account Managers: **Efficient**
- Sales People: **Efficient**
- Inventory workers: **At Risk**
- Purchasing: **Efficient**
- Purchasing: **Efficient**

Note: be sure Marc is fully aligned with the project, it feels like his team does a lot of resistance to change.

Efficient: people are fully productive, and use the system efficiently.

In Transition: people need more training and guidances to use the system at its full potential. A few meeting with managers are necessary.

At Risk: resistance to change is still high; people are not convinced by the value of the new way of working. We need to invest in guidances to achieve the expected result.

Business Achievements

Sales

Increase the quality of leads with lead generation tools

Increase conversion rate using Odoo CRM (Pipeline & Activities)

Addressing all the quality leads on time and decrease the amount of lost leads to less than 10%

Product configurator to fasten recording quotes

Reduce to 5% the recording

Inventory

Increase the quality of leads using lead generation tools

Increase conversion rate using Odoo CRM (Pipeline & Activities)

Addressing all the quality leads on time and decrease the amount of lost leads to less than 10%

Product configurator to fasten recording quotes

Reduce to 5% the recording

02

Lessons learnt



Improve our collaboration

KEEP

Regular on site meetings to unblock complex topics

- Maintain daily remote sessions for day to day work

Continue great team involvement !

- Fasten delivery & validation process
- Ease project acceptance

ADAPT

Stay focus on standard features

- Avoid replicating existing processes / solutions

Get rid off technical wording

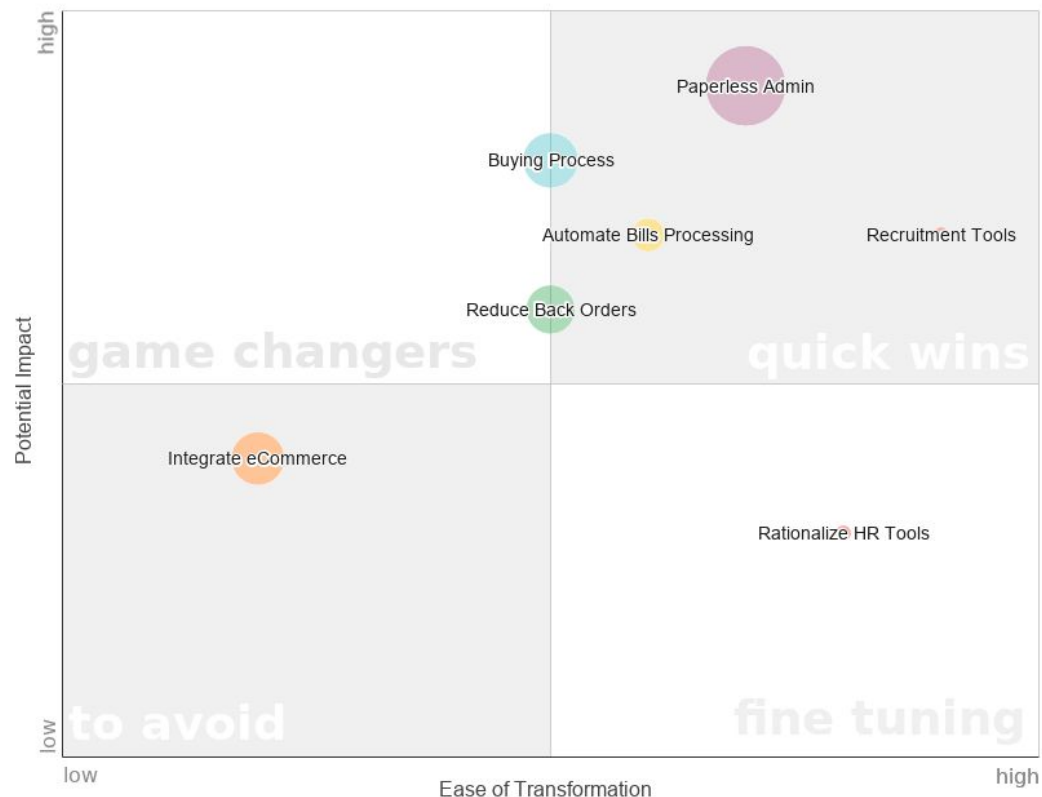
- Speak the other team language

03

Digital Opportunities What's next?



Digital Opportunities



Potential Impact: ability for your employees to do more in less time, with better tools.

Ease of Transformation: how fast or easy it is to digitize the process to get the potential impact.

Bubble Size: number of employees impacted, reflect to total impact for the company

Digital opportunities

Projects with high performance returns

#1 Turn Paperless

Save considerable time using our eSign, our salary configurator and many others. Today: 3 FTE dedicated to scanning, looking for documents, etc.

#2 Automate Billing processes

Make your accountant happier using our OCR, Documents and many others. Today: 2 FTE record invoices

#3 Improve Recruitment tools

From application to employee onboarding, design the perfect recruitment path for your future employees. Today: Too many tools, double encoding, etc.

The background is a dark, semi-transparent collage. It includes a city skyline with various skyscrapers, a hand pointing at a calculator, and a laptop. The text 'Thank you!' is centered over this collage.

Thank you!