CAI ShopVue

BUYING GUIDE

Introduction

Welcome to ShopVue! Your time and your business are important to us, and we want to ensure you have the information you need to start the ShopVue Buying Process.

At ShopVue, we aim for transparency. We know that selecting the right partner for your MES is a significant decision. We also understand that ShopVue is not the right fit for every company. Our product works best for discrete manufacturers with complex operations and a team-oriented culture. Successful implementation of ShopVue demands collaboration and transparent communication with employees in all roles, as well as dedication to continuous improvement.

In addition, we want prospective customers to be aware of the ShopVue Buying Process. Our comprehensive discovery and evaluation process requires team-wide commitment from both parties -- and is effective at ensuring you can make a well-thought-out decision in a reasonably short timeframe.

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Why ShopVue?

ShopVue stands out because of its:

Modular Architecture

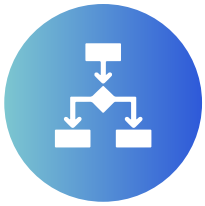
Customers pay for only the features they need.

Quick Time to Value

Implementation is typically completed in 8-12 weeks and customers achieve a positive ROI in 6-12 months.

Secure, Role-Based Access

Unique permissions for operators, supervisors, human resources, and plant management.

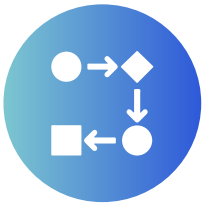


Depth of Functionality

Features include traceability and digital work instructions.

User-Friendly Interface

Operators and supervisors love to use ShopVue.



Flexibility

Both out-of-the-box configuration and on-demand customization based on the customer's needs.

ERP Agnosticism

ShopVue works with almost any ERP--no need to replace an existing platform.

Integrations

Connects to multiple third-party platforms (PLM, APS, QMS/QCS, payroll).

Focus on Value

ShopVue enables continuous improvement.

Company Expertise

More than three decades helping manufacturers optimize operations and recognize quick time to value.

Referenceability

Hear first-hand how ShopVue has driven meaningful and measurable improvements in shop floor performance.

The ShopVue Buying Process: 5 Phases

Introduction: A ShopVue account manager will conduct an initial call to discuss and understand your business needs, explain how ShopVue modules and licensing work, review ballpark pricing, and identify team members and key stakeholders.

1 INTRODUCTION

TIMING: WEEK 1 I DURATION: 2 HOURS / 1 SESSION

A ShopVue account manager will conduct an initial call to discuss and understand your business needs, explain how ShopVue modules and and key stakeholders.

2 DISCOVERY

TIMING: WEEKS 2-3 I DURATION: 4-6 HOURS

An in-depth review of scope and requirements, the manufacturing process, routing, BOM, and reports. Upon completion, Discovery should yield an assessment of how well ShopVue would fulfill the needs of your business.

3 REVIEW

TIMING: WEEKS 3-5 I DURATION: 4 HOURS / 2 SESSIONS

This phase centers on a comprehensive meeting with all stakeholders, in which each shares their individual perspective and priorities. Called the Team Survey, the discussion results in a well-defined requirements matrix and a foundation for a company-specific product demonstration.

4 QUALIFICATION

TIMING: WEEKS 4-6 I DURATION: 24 HOURS / 2 DAYS

The fourth step of the Buying Process often entails a two-day site visit (Site Survey). We'll become familiar with your manufacturing and business processes, from start to finish, so we can deliver a detailed proposal, timeline, and pricing you can count on. You'll also be able to conduct reference checks by speaking with existing ShopVue customers.

5 COMMIT

TIMING: WEEKS 6-8 I DURATION: 8 HOURS

We'll review the detailed proposal and contracts and outline objectives for the subsequent kick-off meeting. At this point, you've completed the selection process of ShopVue as your MES -- congratulations!

TOTAL DURATION: 8 WEEKS

Implementation

After the selection process is complete, an implementation consultant (or team) is assigned to your project. The first milestone is a kickoff conference call to be held within two weeks of contract execution and receipt of the down payment.

On average, onboarding and implementation take about 8-12 weeks. A broad implementation timeline might look like this:

Activity	Date
KICKOFF MEETING & IMPLEMENTATION REVIEW	**January**
CLASS PREPARATION	**February**
SHOPVUE CONFIGURATION WORKSHOP*	**March**
CONFIGURATION/TESTING	**March/April**
CONFERENCE ROOM PILOT**	**April**
GO LIVE	**April/May**

Once implementation is complete, your ShopVue team will conduct quarterly meetings to ensure ongoing success.

*About the Configuration Workshop

A key early milestone of the ShopVue implementation process is the Configuration Workshop, hosted at ShopVue's offices in Portland Maine. ShopVue holds training workshops throughout the year, each with a limited number of participants. Registration is available only after the agreements are executed and the software is purchased.

During the ShopVue workshop your team will learn about ShopVue's technical details and how to configure the system for your specific needs. The workshop is a requirement for the customer's core project team and serves as the baseline for beginning the project deliverables. You and your team will work with a dedicated ShopVue Consultant during the workshop. We will conduct a detailed review to further validate your requirements, begin configuring some high-level process and workflow designs and establish a test environment so that, upon your return to your facility, you'll have a functional ShopVue system.

**About the Conference Room Pilot

The Conference Room Pilot is the culmination of a collaborative work model in which ShopVue's deliverables and the client's deliverables are brought together into a single environment; the Conference Room Pilot. It's during this phase that we test, adapt, and make appropriate modifications to move from a pilot to production.

ShopVue Roles & Responsibilities

When evaluating ShopVue as a potential solution for your manufacturing operations, it's critical to understand who will need to be involved, on either side of the relationship. At ShopVue, resources are:

PROJECT CONSULTANT

- Plays lead role in your implementation
- Creates and maintains project plans
- Understands requirements in detail
- Designs and delivers detailed solutions
- Hosts routine status meetings

ACCOUNT MANAGER

- Clarifies purchase details
- Answers delivery questions
- Negotiates scope changes
- Advises on expanded use
- Meets with senior management regarding critical success factors and project expectations

HARDWARE CONSULTANT

- Stages servers with ShopVue and third-party software
- Assists in initial set up of terminals and scanners

PROGRAMMER

- Performs customizations
- Creates custom reports

SUPPORT

- Helps with basic usage and troubleshooting (limited to non-site-specific issues)
- Assists with installing additional clients

Customer Roles & Responsibilities

On the customer side, the typical resources are identified below (a single individual may fulfill several roles):

PROJECT SPONSOR

- Sets vision
- Secures funding
- Evaluates success
- Attends the four most important status meetings

PROJECT LEAD

- Sets schedules and milestones
- Manages scope changes
- Monitors user satisfaction and compliance
- Acts as primary interface to ShopVue consultant
- Understands tradeoffs and makes most project decision

APPLICATION

- Acts as primary interface to ShopVue support after go-live

ADMINISTRATOR

- Has deepest knowledge of ShopVue functionality and configuration options
- May perform configuration with oversight of a Consultant
- Understands all the setup data, such as Workstations, Pay Groups, Authorizations and Lookups
- Creates training materials
- Oversees procurement of badges

TECHNICAL ADMINISTRATOR

- Manages servers
- Installs and maintains clients
- Troubleshoots hardware
- Monitors and troubleshoots interfaces
- Maintains ShopVue Workstation table

ERP EXPERT

- Understands ERP at a detailed level and how it is configured at your company:
  - Work order processing lifecycle: release, periodic updates and close
  - What host needs for data
  - Impact of interface problems
- Advises team on all complex matters regarding ERP

Customer Roles & Responsibilities (Continued)

On the customer side, the typical resources are identified below (a single individual may fulfill several roles):

SHOP FLOOR SMEs

Understand how shop operates, including:

Machine usage and impact of downtime on workflow

—

Order identification and tracking

—

Work prioritization

—

Where counts are done and how they are made

—

Rework processing

Explain requirements at a detailed level

Evaluate and decide on proposed solutions

Are prime advocates for the configurable UI (user interface) that will be accepted and used properly, i.e., validation to ensure accurate data

Train supervisors, operators and assemblers

HR SME

Understands attendance policies, including:

Pay rules

—

Union contract

—

Vacation request and tracking process

—

Discipline procedures

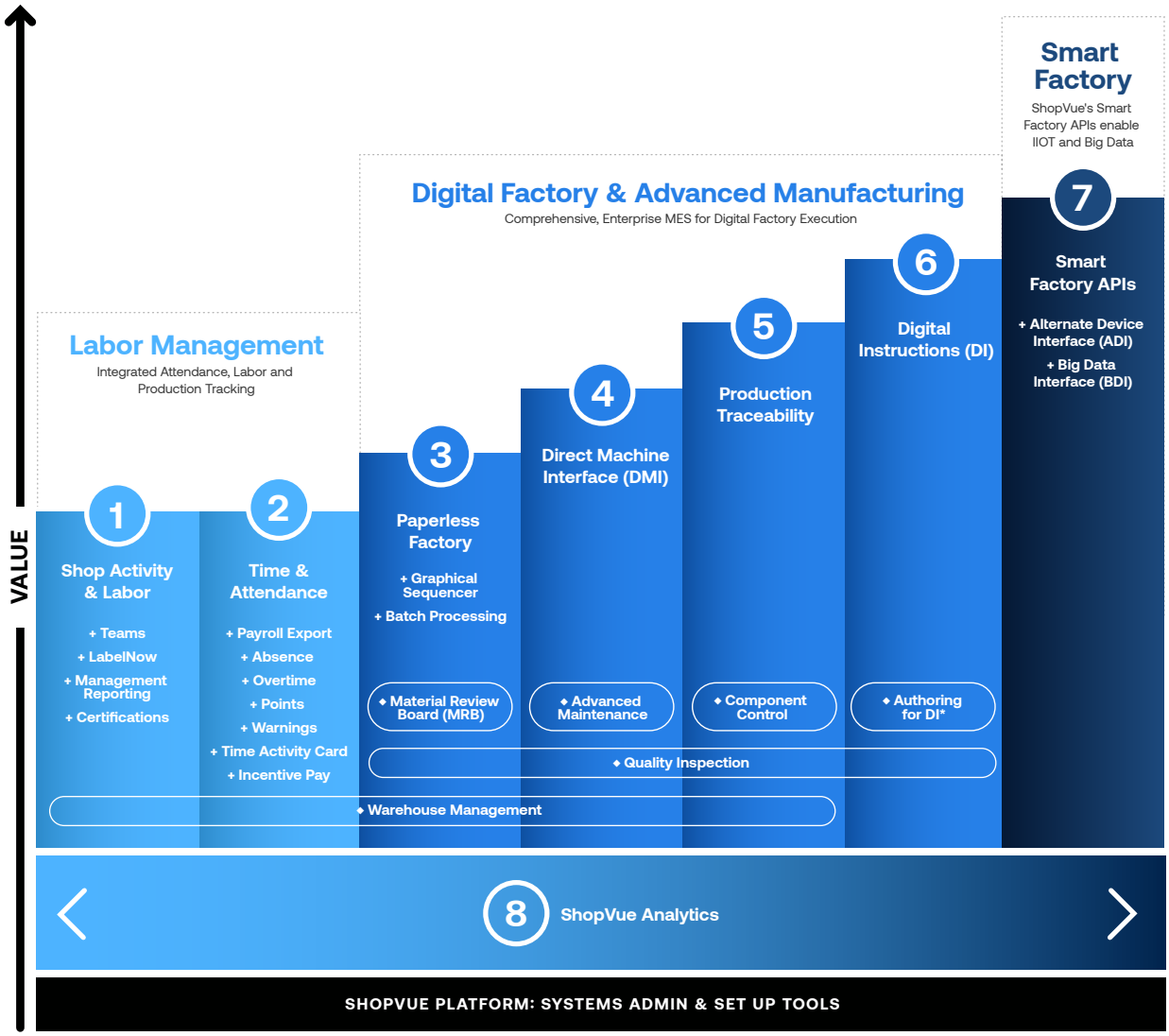
FINANCE SME

Understands cost-accounting requirements

Validates calculations and reports from a financial aspect

SME: Subject Matter Expert

The ShopVue Modular MES Platform



What's Next

READY TO GET STARTED WITH SHOPVUE?

SCHEDULE YOUR INTRODUCTORY CALL TODAY.

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