# 70.01 Plan to produce scenario board discovery workshop

The Plan to produce scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end manufacturing planning and execution process for all key stakeholders in the implementation of Dynamics 365. This workshop will guide participants through the key scenarios and business process areas involved in the Plan to produce process. It will include considerations for discrete, process, and lean manufacturing environments. By leveraging visual representations and interactive discussions, the workshop aims to align all stakeholders on the vision for the project and ensure that the new technology solution meets the needs of its users.

## Assumptions

* The Plan to produce end-to-end business process is in scope for the Dynamics 365 project.
* The scenario board is available and leveraged to conduct the workshop.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + Production managers – responsible for developing and overseeing production strategies across manufacturing models.
  + Operations managers – responsible for planning and coordinating production operations, including scheduling and resource allocation.
  + Manufacturing engineers – responsible for designing and optimizing production processes and ensuring manufacturability.
  + Quality control managers – responsible for defining and enforcing quality standards and managing inspections and nonconformance.
  + Shop floor supervisors – responsible for day-to-day execution of production activities and managing shop floor personnel.
  + Lean coordinators or continuous improvement leads – responsible for implementing lean practices and driving efficiency improvements.
  + IT department – responsible for implementing and maintaining technology solutions to support production planning and execution.
  + MES/WMS system owners – responsible for managing manufacturing execution systems and warehouse management systems that integrate with Dynamics 365.
  + Finance department – responsible for tracking production costs, variances, and financial performance.
  + Supply chain planners – responsible for aligning production plans with demand forecasts and material availability.
  + Legal and compliance department – responsible for ensuring regulatory compliance related to production and quality standards.
  + Executive leadership – responsible for strategic oversight and ensuring alignment of production capabilities with business goals.

## Objectives

* Understand the customer’s manufacturing model(s) and process scope.
* Identify key scenarios and requirements across manufacturing types.
* Document agreed business scope for each manufacturing model.

## High-level Agenda

* Introduction and objectives
* Overview of Plan to produce process
* Discussion of discrete, process, and lean manufacturing scenarios
* Interactive Q&A session
* Wrap-up and next steps

## Key Questions

* Introduction and objectives
  + What are your primary goals for implementing Dynamics 365 in your production operations?
  + Which manufacturing models (discrete, process, lean) are currently in use across your organization?
  + Are there any strategic initiatives (e.g., digital transformation, sustainability, cost reduction) driving this implementation?
  + What are the biggest challenges you face today in planning or executing production?
* Overview of Plan to produce process
  + Can you walk us through your current end-to-end production process?
  + Are there variations in the process by site, product line, or business unit?
  + How do you currently differentiate between make-to-stock, make-to-order, and engineer-to-order processes?
  + What are the key inputs and outputs at each stage of your production process?
  + Are there any regulatory or compliance requirements that impact your production planning or execution?
* Detailed discussion on key scenarios
  + How do you currently define and manage your production strategies?
  + What tools or systems are used for production planning and scheduling?
  + How do you handle production orders, batch orders, and kanban jobs?
  + What are your quality control checkpoints and how are they documented?
  + How do you track and manage production performance (e.g., OEE, scrap, downtime)?
  + Are there any seasonal or demand-driven fluctuations that impact your planning?
  + How do you manage co-products, by-products, or rework in your process?
  + What are the key pain points or bottlenecks in your current production process?
* Data migration
  + What production-related data will need to be migrated (e.g., BOMs, routings, formulas, kanban rules)?
  + How is your current production master data structured and maintained?
  + Are there known data quality issues (e.g., duplicates, outdated records, missing fields)?
  + What historical data (e.g., production orders, performance metrics) needs to be retained?
  + How do you plan to validate and reconcile data after migration?
  + Who will be responsible for data cleansing and ownership during the migration?
* Integrations
  + What systems need to be integrated with Dynamics 365 (e.g., MES, WMS, PLM, SCADA)?
  + How is data currently exchanged between your production system and other platforms?
  + Are there real-time integration needs (e.g., machine data, shop floor feedback)?
  + What protocols or middleware are used for integration today?
  + Are there any known challenges or limitations with your current integration architecture?
  + How do you plan to test and validate integrations during implementation?
* Interactive Q&A session
  + Are there any unique or edge-case scenarios we haven’t covered yet?
  + What concerns do you have about change management or user adoption?
  + Are there any reporting or analytics needs that haven’t been addressed?
  + What does success look like for your team at go-live and beyond?

## Scenario board

Following is a sample scenario board template for the Plan to produce process.



The image is a flowchart titled Plan to Produce Scenario Board that outlines a business process from source to pay. The top row depicts a basic flowchart of the business process areas for the Plan to produce process. Below each process step there are one or more blue boxes that depict scenarios and key attributes of the business process area for discussion in the workshop. The bottom of the graphic includes horizontal or supporting processes that support the entire Plan to produce process.

1. **70.10 Develop Production Strategies**
   * **Scenarios**
     + Make-to-stock
     + Make-to-order
     + Assemble-to-order
     + Engineer-to-order
   * **Compliance**
     + Industry-specific manufacturing standards
     + Environmental and safety regulations
     + Trade compliance
   * **Policies**
     + Production planning policies
     + Inventory buffer strategies
     + Outsourcing and subcontracting policies
     + Sustainability and waste reduction
2. **70.20 Plan Production Operations**
   * **Scenarios**
     + Master production scheduling (MPS)
     + Material requirements planning (MRP)
     + Capacity planning
     + Demand forecasting
   * **Compliance**
     + Regulatory planning requirements
     + Labor and shift regulations
   * **Policies**
     + Scheduling rules and priorities
     + Lead time management
     + Inventory replenishment policies
     + Supplier coordination protocols
3. **70.30 Run Production Operations**
   * **Scenarios**
     + Discrete manufacturing
     + Process manufacturing
     + Batch production
     + Mixed-mode production
   * **Compliance**
     + Equipment safety standards
     + Operator certifications
     + Traceability and batch control
   * **Policies**
     + Work order management
     + Shop floor control
     + Labor tracking
     + Equipment maintenance schedules
4. **70.60 Control Production Quality**
   * **Scenarios**
     + In-process quality checks
     + Final product inspection
     + Statistical process control (SPC)
     + Non-conformance handling
   * **Compliance**
     + ISO 9001
     + Industry-specific quality standards
     + Regulatory reporting
   * **Policies**
     + Quality assurance protocols
     + Corrective and preventive actions (CAPA)
     + Product recall procedures
     + Supplier quality management
5. **70.70 Analyze Production Operations**
   * **Metrics**
     + Overall Equipment Effectiveness (OEE)
     + First pass yield
     + Scrap and rework rates
     + Production throughput
   * **Reports**
     + Production performance reports
     + Downtime analysis
     + Quality trend reports
     + Cost of goods manufactured (COGM)
     + Production sustainability
   * **Tracing**
     + Backward
     + Forward
     + Specific batch/serial
     + Recall

# 70.02 Plan to produce storyline design review workshop

The Plan to produce storyline design review workshop is a crucial step in refining the design of the manufacturing process. This workshop focuses on reviewing the storyline or “happy path” defined in the Plan to produce scenario board discovery workshop, conducting a fit-to-standard review, reviewing the configured solution, and reviewing high-level designs and slides for parts that cannot be demonstrated. This workshop takes place after the initial Plan to produce scenario board workshop and is based on the initial discovery phase. During this session, we will delve deeper into the chosen storyline or “happy path”, ensuring that it aligns with business requirements and standards. We will also identify any gaps or areas that need further refinement. By the end of this workshop, the aim is to achieve 80-90% accuracy and acceptance for the selected storyline, ensuring that we are well-prepared for the next phases of the project.

## Assumptions

* The storyline is based on the agreed scope from the scenario board workshop.
* Dynamics 365 is configured for each manufacturing model in scope.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + Production managers – responsible for developing and overseeing production strategies across manufacturing models.
  + Operations managers – responsible for planning and coordinating production operations, including scheduling and resource allocation.
  + Manufacturing engineers – responsible for designing and optimizing production processes and ensuring manufacturability.
  + Quality control managers – responsible for defining and enforcing quality standards and managing inspections and nonconformance.
  + Shop floor supervisors – responsible for day-to-day execution of production activities and managing shop floor personnel.
  + Lean coordinators or continuous improvement leads – responsible for implementing lean practices and driving efficiency improvements.
  + IT department – responsible for implementing and maintaining technology solutions to support production planning and execution.
  + MES/WMS system owners – responsible for managing manufacturing execution systems and warehouse management systems that integrate with Dynamics 365.
  + Finance department – responsible for tracking production costs, variances, and financial performance.
  + Supply chain planners – responsible for aligning production plans with demand forecasts and material availability.
  + Legal and compliance department – responsible for ensuring regulatory compliance related to production and quality standards.
  + Executive leadership – responsible for strategic oversight and ensuring alignment of production capabilities with business goals.

## Objectives

* Demonstrate Dynamics 365 capabilities for each manufacturing model.
* Validate the fit-to-standard approach.
* Gather feedback and insights.
* Document gaps, risks, issues, and decisions.

## High-level Agenda

* Introduction and objectives
* Demonstration of storyline scenarios (discrete, process, lean)
* Discussion of gaps, risks, and decisions
* Q&A and feedback
* Wrap-up and next steps

## Key Questions

* Does the solution support your production model(s) effectively?
* Are there any gaps in functionality or integration?
* What changes are needed to align with your operational goals?
* Are there any concerns with usability, scalability, or compliance?
* How does the solution address the identified pain points and bottlenecks in your current process?

# 70.10.001 Develop production strategies deep-dive discovery workshop

This workshop is designed to define and refine production strategies across discrete, process, and lean manufacturing environments using Dynamics 365. It brings together stakeholders from across the organization to align on planning models, constraints, and execution approaches tailored to each manufacturing mode.

## Assumptions

* One or more manufacturing models (discrete, process, lean) are in scope.
* Stakeholders from all relevant departments are available and engaged.
* Current production strategies and master data are documented and accessible.

## Objectives

* Define production strategy requirements across all manufacturing models.
* Identify process gaps and improvement opportunities.
* Plan for data migration and system integrations.

## High-level agenda

* Introduction and objectives
* Review of current production strategies
* Discussion by manufacturing model (discrete, process, lean)
* Approval workflows and compliance
* Wrap-up and next steps

## Stakeholders

* Production managers
* Operations managers
* Manufacturing engineers
* Process engineers
* Lean coordinators or CI leads
* Quality control managers
* IT and integration leads
* Finance and costing analysts
* Compliance and regulatory officers
* Executive leadership

## Key questions

* General
* What are your primary production strategy goals (e.g., cost, flexibility, lead time)?
* Are different strategies used across sites, product lines, or business units?
* How are production strategies aligned with demand planning and inventory policies?
* What are the biggest challenges in your current planning and execution approach?
* Discrete manufacturing
* What production models are used (make-to-stock, make-to-order, engineer-to-order)?
* How are routings and BOMs structured and maintained?
* How is capacity planning handled across work centers and resources?
* What tools are used for finite scheduling and sequencing?
* How are engineering changes managed and approved?
* What costing methods are used (standard, actual, etc.)?
* What data needs to be migrated (BOMs, routings, resources)?
* What systems need to integrate (e.g., PLM, MES)?
* Process manufacturing
* How are formulas and batch sizes defined and scaled?
* How are co-products and by-products tracked and costed?
* What are the key regulatory requirements (e.g., FDA, REACH)?
* How are quality specifications and test results managed?
* How are batch records and traceability handled?
* What are the key pain points in current batch planning?
* What data needs to be migrated (formulas, specs, batch records)?
* What systems need to integrate (e.g., LIMS, lab systems)?
* Lean manufacturing
* What types of kanban are used (event, scheduled, fixed)?
* How are production flows and work cells structured?
* How is takt time calculated and monitored?
* What lean metrics are tracked (e.g., cycle time, throughput)?
* How are continuous improvement initiatives managed?
* What data needs to be migrated (kanban rules, flow models)?
* What systems need to integrate (e.g., MES, visual boards)?

# 70.20.001 Plan Production Operations Deep-Dive Discovery Workshop

This workshop is designed to define and refine production operations planning across make-to-stock, make-to-order, and engineer-to-order environments using Dynamics 365. It brings together stakeholders from across the organization to align on planning models, constraints, and execution approaches tailored to each operating model.

## Assumptions

- One or more operating models (make-to-stock, make-to-order, engineer-to-order) are in scope.  
- Stakeholders from all relevant departments are available and engaged.  
- Current production planning strategies and master data are documented and accessible.

## Objectives

- Define production planning requirements across all operating models.  
- Identify process gaps and improvement opportunities.  
- Plan for data migration and system integrations.

## High-level agenda

- Introduction and objectives  
- Review of current production planning strategies  
- Discussion by operating model (make-to-stock, make-to-order, engineer-to-order)  
- Approval workflows and compliance  
- Wrap-up and next steps

## Stakeholders

- Production managers  
- Operations managers  
- Manufacturing engineers  
- Process engineers  
- Lean coordinators or CI leads  
- Quality control managers  
- IT and integration leads  
- Finance and costing analysts  
- Compliance and regulatory officers  
- Executive leadership

## Key questions

* **General**
  + What are your primary production planning goals (e.g., cost, flexibility, lead time)?
  + Are different planning strategies used across sites, product lines, or business units?
  + How are production plans aligned with demand planning and inventory policies?
  + What are the biggest challenges in your current planning and execution approach?
* **Make-to-stock**
  + How are production schedules created and maintained?
  + How is inventory managed to ensure stock levels meet demand?
  + What tools are used for master planning and forecasting?
  + How are production orders released and tracked?
  + What are the key constraints in your current make-to-stock planning process?
  + How are safety stock levels determined?
  + What data needs to be migrated (production schedules, inventory levels)?
  + What systems need to integrate (e.g., ERP, WMS)?
* **Make-to-order**
  + How are customer orders translated into production orders?
  + How is capacity planning handled for custom orders?
  + What tools are used for finite scheduling and sequencing?
  + How are production orders prioritized and managed?
  + What are the key constraints in your current make-to-order planning process?
  + How are lead times calculated and managed?
  + What data needs to be migrated (customer orders, production orders)?
  + What systems need to integrate (e.g., CRM, ERP)?
* **Engineer-to-order**
  + How are engineering designs integrated into production planning?
  + How are project timelines and milestones managed?
  + What tools are used for project scheduling and resource allocation?
  + How are production orders tracked and managed for complex projects?
  + What are the key constraints in your current engineer-to-order planning process?
  + How are changes to engineering designs managed and communicated?
  + What data needs to be migrated (engineering designs, project plans)?
  + What systems need to integrate (e.g., PLM, ERP)?

# 70.30.001 Run discrete manufacturing production operations deep-dive discovery workshop

This workshop is designed to define and refine the production operations for discrete manufacturing environments using Dynamics 365. It covers the start, running, picking, staging, reporting as finished, handling of errors, and ending of the production including putting the finished good or WIP product into inventory.

## Assumptions

* Discrete manufacturing is a core production model in scope.
* Stakeholders from engineering, planning, and operations are available.
* Current production operations and master data are documented and accessible.

## Objectives

* Define discrete production operations requirements.
* Identify gaps in current processes and systems.
* Plan for data migration and system integrations.

## High-level agenda

* Introduction and objectives
* Review of current discrete production operations
* Discussion by production stages (starting, running, picking, staging, reporting as finished, handling errors, ending production)
* Approval workflows and compliance
* Wrap-up and next steps

## Stakeholders

* Production managers
* Manufacturing engineers
* Operations managers
* IT and system architects
* Finance and costing analysts
* Compliance and quality representatives

## Key questions

* ***Starting Production***
  + How are production orders initiated?
  + What information is required to start production?
  + How are materials allocated and staged for production?
  + What systems are used to track production order status?
* ***Running Production***
  + How is progress tracked during production?
  + How are labor and machine hours recorded?
  + What tools are used for real-time monitoring?
  + How are deviations from the plan handled?
* ***Picking***
  + How are materials picked for production?
  + What systems are used to manage inventory during picking?
  + How are shortages or discrepancies handled?
  + How is material consumption recorded?
* ***Staging***
  + How are materials staged for production?
  + What systems are used to track staged materials?
  + How are staging areas managed?
  + How is material movement tracked?
* ***Reporting as Finished***
  + How is production completion reported?
  + What information is required to report production as finished?
  + How are finished goods or WIP products moved to inventory?
  + How are production variances recorded?
* ***Handling Errors***
  + How are production errors identified?
  + What systems are used to track and manage errors?
  + How are corrective actions implemented?
  + How are error impacts on production recorded?
* ***Ending Production***
  + How is production order closure managed?
  + What information is required to close a production order?
  + How are finished goods or WIP products moved to inventory?
  + How are production records archived?

# 70.30.002 Run process manufacturing production operations deep-dive discovery workshop

This workshop focuses on defining production operations for process manufacturing environments using Dynamics 365. It includes discussions on starting, running, picking, staging, reporting as finished, handling errors, and ending production including inventory handling.

## Assumptions

* Process manufacturing is a core production model in scope.
* Stakeholders from quality, compliance, and production planning are available.
* Current production operations and master data are documented.

## Objectives

* Define process manufacturing operations requirements.
* Identify gaps in formula and batch management.
* Plan for data migration and regulatory compliance.

## High-level agenda

* Introduction and objectives
* Review of current process manufacturing operations
* Discussion by production stages (starting, running, picking, staging, reporting as finished, handling errors, ending production)
* Approval workflows and compliance
* Wrap-up and next steps

## Stakeholders

* Process engineers
* Quality assurance managers
* Compliance officers
* Production planners
* IT and integration leads
* Finance and costing analysts

## Key questions

* ***Starting Production***
  + How are batch orders initiated?
  + What information is required to start a batch?
  + How are materials allocated and staged for production?
  + What systems are used to track batch order status?
* ***Running Production***
  + How is progress tracked during batch production?
  + How are labor and machine hours recorded?
  + What tools are used for real-time monitoring?
  + How are deviations from the batch plan handled?
* ***Picking***
  + How are materials picked for batch production?
  + What systems are used to manage inventory during picking?
  + How are shortages or discrepancies handled?
  + How is material consumption recorded?
* ***Staging***
  + How are materials staged for batch production?
  + What systems are used to track staged materials?
  + How are staging areas managed?
  + How is material movement tracked?
* ***Reporting as Finished***
  + How is batch completion reported?
  + What information is required to report a batch as finished?
  + How are finished goods or WIP products moved to inventory?
  + How are production variances recorded?
* ***Handling Errors***
  + How are batch production errors identified?
  + What systems are used to track and manage errors?
  + How are corrective actions implemented?
  + How are error impacts on production recorded?
* ***Ending Production***
  + How is batch order closure managed?
  + What information is required to close a batch order?
  + How are finished goods or WIP products moved to inventory?
  + How are production records archived?

# 70.30.003 Run lean manufacturing production operations deep-dive discovery workshop

This workshop is designed to define lean manufacturing operations using Dynamics 365. It focuses on kanban rules, production flows, takt time, and continuous improvement practices, covering the start, running, picking, staging, reporting as finished, handling errors, and ending production including inventory handling.

## Assumptions

* Lean manufacturing is a core production model in scope.
* Stakeholders from operations, lean leadership, and IT are available.
* Current lean practices and kanban setups are documented.

## Objectives

* Define lean manufacturing operations requirements.
* Identify gaps in current lean execution and planning.
* Plan for data migration and lean performance tracking.

## High-level agenda

* Introduction and objectives
* Review of current lean manufacturing operations
* Discussion by production stages (starting, running, picking, staging, reporting as finished, handling errors, ending production)
* Approval workflows and compliance
* Wrap-up and next steps

## Stakeholders

* Lean coordinators or CI leads
* Operations managers
* Shop floor supervisors
* IT and MES integration leads
* Finance and performance analysts

## Key questions

* ***Starting Production***
  + How are kanban jobs initiated?
  + What information is required to start a kanban job?
  + How are materials allocated and staged for production?
  + What systems are used to track kanban job status?
* ***Running Production***
  + How is progress tracked during kanban production?
  + How are labor and machine hours recorded?
  + What tools are used for real-time monitoring?
  + How are deviations from the kanban plan handled?
* ***Picking***
  + How are materials picked for kanban production?
  + What systems are used to manage inventory during picking?
  + How are shortages or discrepancies handled?
  + How is material consumption recorded?
* ***Staging***
  + How are materials staged for kanban production?
  + What systems are used to track staged materials?
  + How are staging areas managed?
  + How is material movement tracked?
* ***Reporting as Finished***
  + How is kanban job completion reported?
  + What information is required to report a kanban job as finished?
  + How are finished goods or WIP products moved to inventory?
  + How are production variances recorded?
* ***Handling Errors***
  + How are kanban production errors identified?
  + What systems are used to track and manage errors?
  + How are corrective actions implemented?
  + How are error impacts on production recorded?
* ***Ending Production***
  + How is kanban job closure managed?
  + What information is required to close a kanban job?
  + How are finished goods or WIP products moved to inventory?
  + How are production records archived?

# 70.60 Control Production Quality Deep-Dive Discovery Workshop

This workshop is designed to define and refine quality control strategies across discrete, process, and lean manufacturing environments using Dynamics 365. It brings together stakeholders from across the organization to align on quality control planning, inspection, nonconformance handling, compliance, and reporting.

## Assumptions

* One or more manufacturing models (discrete, process, lean) are in scope.
* Stakeholders from all relevant departments are available and engaged.
* Current quality control strategies and master data are documented and accessible.

## Objectives

* Define quality control strategy requirements across all manufacturing models.
* Identify process gaps and improvement opportunities.
* Plan for data migration and system integrations.

## High-level Agenda

* Introduction and objectives
* Review of current quality control strategies
* Discussion by manufacturing model (discrete, process, lean)
* Approval workflows and compliance
* Wrap-up and next steps

## Stakeholders

* Production managers
* Operations managers
* Manufacturing engineers
* Process engineers
* Lean coordinators or CI leads
* Quality control managers
* IT and integration leads
* Finance and costing analysts
* Compliance and regulatory officers
* Executive leadership

## Key Questions

* General
  + What are your primary quality control goals (e.g., defect reduction, compliance, customer satisfaction)?
  + Are different quality control strategies used across sites, product lines, or business units?
  + How are quality control strategies aligned with production planning and execution?
  + What are the biggest challenges in your current quality control approach?
* Discrete Manufacturing
  + How are inspection orders and test results managed?
  + What are the key quality checkpoints in your discrete manufacturing process?
  + How are nonconformance issues tracked and resolved?
  + What tools are used for quality data collection and analysis?
  + How are engineering changes impacting quality managed?
  + What data needs to be migrated (inspection plans, test results, nonconformance records)?
  + What systems need to integrate (e.g., MES, QMS)?
* Process Manufacturing
  + How are batch quality and lab testing managed?
  + What are the key regulatory requirements (e.g., FDA, REACH) impacting quality?
  + How are co-products and by-products impacting quality tracked?
  + How are quality specifications and test results managed?
  + How are batch records and traceability handled?
  + What are the key pain points in current batch quality management?
  + What data needs to be migrated (quality specs, test results, batch records)?
  + What systems need to integrate (e.g., LIMS, lab systems)?
* Lean Manufacturing
  + How are visual controls and quality at source implemented?
  + What lean metrics are tracked (e.g., cycle time, defect rate)?
  + How are continuous improvement initiatives impacting quality managed?
  + How are error-proofing and mistake-proofing techniques implemented?
  + What data needs to be migrated (quality metrics, CI records)?
  + What systems need to integrate (e.g., MES, visual boards)?

# 70.70 Analyze Production Operations Deep-Dive Discovery Workshop

The Analyze Production Operations deep dive discovery workshop is designed to help your organization effectively analyze production operations using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for analyzing production operations, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in production operations analysis decisions are available and willing to participate.
* Current production operations analysis strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of production operations analysis principles and standards.
* Relevant data on production operations analysis strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level Agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Stakeholders

* Production managers
* Operations managers
* Manufacturing engineers
* Process engineers
* Lean coordinators or CI leads
* Quality control managers
* IT and integration leads
* Finance and costing analysts
* Compliance and regulatory officers
* Executive leadership

## Key Questions

* Production costing
* How are production costs tracked and reported?
* What costing methods are used (standard, actual, etc.)?
* How are variances (material, labor, overhead) analyzed?
* What tools are used for cost analysis and reporting?
* How is cost data integrated with financial systems?
* What are the key pain points in current cost tracking?
* What data needs to be migrated (cost records, variance reports)?
* What systems need to integrate (e.g., ERP, financial systems)?
* Quality results
* How are quality metrics tracked and reported?
* What tools are used for quality analysis?
* How are nonconformance and corrective actions managed?
* How is quality data integrated with production systems?
* What are the key pain points in current quality tracking?
* What data needs to be migrated (quality records, test results)?
* What systems need to integrate (e.g., QMS, MES)?
* Tracing
* How is traceability managed across production?
* What tools are used for tracing and tracking?
* How are batch records and serial numbers handled?
* How is traceability data integrated with production systems?
* What are the key pain points in current traceability?
* What data needs to be migrated (traceability records, batch data)?
* What systems need to integrate (e.g., MES, ERP)?
* Continuous improvement opportunities
* How are continuous improvement initiatives tracked?
* What tools are used for CI analysis?
* How are CI metrics integrated with production systems?
* What are the key pain points in current CI tracking?
* What data needs to be migrated (CI records, improvement plans)?
* What systems need to integrate (e.g., MES, CI tools)?
* Production sustainability
* How are sustainability metrics tracked and reported?
* What tools are used for sustainability analysis?
* How are sustainability initiatives integrated with production systems?
* What are the key pain points in current sustainability tracking?
* What data needs to be migrated (sustainability records, metrics)?
* What systems need to integrate (e.g., MES, sustainability tools)?