Template-03 Proposal Presentation Content

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# Stakeholders

* Owner
* Accountant
* Labour
* Sales and Purchase Manager
* Supplier
* Distributors (wholesale/distributor??)

# Opportunities

* Streamlined Operations:

ERPNext offers an integrated platform to streamline various business processes, including procurement, inventory management, manufacturing, sales, and finance. By centralizing operations, inefficiencies can be eliminated, errors can be reduced and overall productivity can be improved.

* Real-Time Insights:

ERPNext offers real-time visibility into the business operations through comprehensive reporting and analytics, enabling informed decision-making and proactive management.

* Improved Inventory Management:

With ERPNext, inventory control becomes more precise, reducing errors and ensuring optimal stock levels.

* Cost Reductions:

ERPNext aids in identifying cost-saving opportunities by automating manual processes, reducing paperwork, and optimizing resource utilization, thereby lowering operating costs and increasing profitability.

* Scalability:

ERPNext's scalable design accommodates business growth seamlessly, ensuring continued effectiveness as the company expands.Open source software so no licensing fee, extension/evolution possible due to open source.

# Existing System

The company currently relies on manual and paper-based processes to manage their operations. Orders are received through a mix of phone calls and in-person visits, leading to potential errors and delays in order processing.

For sourcing raw materials, the company owner contacts vendors directly and makes payments via cheques, cash, or online transfers. These transactions are recorded manually, leading to inefficiencies and a lack of transparency in financial management.

In addition, stock replenishment is managed reactively, with staff manually tracking inventory levels and placing orders based on visual inspections. This ad-hoc approach to inventory management can lead to stockouts or overstocking, impacting production schedules and cash flow.

Moreover, there is no structured production planning process in place, resulting in ad-hoc production scheduling and potential bottlenecks in the manufacturing process. This lack of coordination leads to suboptimal resource utilization and delays in order fulfillment.

Overall, the reliance on manual and paper-based processes hinders efficiency, introduces errors, and limits the company's ability to plan and scale effectively.

# Problem Statement

|  |  |  |  |
| --- | --- | --- | --- |
| **The Problem of** | **Affects** | **Results of Which** | **Benefits** |
| Lack of structured production planning | Owner, Employees | * Ad-hoc production scheduling * potential bottlenecks in production process      * suboptimal resource utilization | Improved production efficiency, optimized resource usage |
| Manual inventory tracking | Owner, Employees, Suppliers | * Inventory inaccuracies causing stock outs or overstocking * delays in production due to inaccurate inventory records | Enhanced inventory management, reduced stockouts and waste |
| Inefficient procurement process | Owner, Suppliers | * Delays in procurement process, * higher costs due to lack of visibility into vendor performance | Streamlined procurement process,  cost savings through better vendor management |

# Proposed Solution

The proposed solution involves implementing ERPNext to create a streamlined and efficient system for managing operations. This solution include

* **Centralized Order Processing**: Automate order processing from receipt to fulfillment, eliminating errors and delays.
* **Automated Financial Management:** Streamline financial transactions and record-keeping for enhanced transparency and decision-making.
* **Structured Production Planning:** Facilitate structured production scheduling and resource allocation to optimize efficiency.
* **Inventory and Procurement Management:** Streamline inventory tracking and procurement processes to reduce stockouts and optimize procurement.
* **Distributor Relationship Management (CRM):** Implement CRM functionality to manage customer interactions, track sales leads, and improve customer service.
* **Reporting and Analytics:** Provide comprehensive reporting and analytics capabilities to gain insights into key business metrics. Customize dashboards and reports to monitor performance and identify areas for improvement.