Speedy Boats

### ERP Optimization Plan

### Request for Proposal

September 18, 2018

### Document history

|  |  |  |  |
| --- | --- | --- | --- |
| Version | When | Who | What |
| 1.0 | 2018-09-12 | Speedy Boats | Initial draft of RFP |

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### 1.0 Problem description

Speedy Boats is a 30 person rigid hull inflatable boat (RHIB) design and manufacturing company located on Vancouver Island, British Columbia. The company has recently endeavored to modify their business model to enable scalability, and the integration of an ERP system has been and will continue to be integral to this pursuit.

The purpose of the ERP system is to allow the company to track the cost of their products and to utilize that information to forecast costs of future potential projects. However, this system is currently in the process of being replaced, for the reasons being:

* The current system is not user friendly. Many employees report significant difficulty using the software and a lot of time is wasted
* The current system is too expensive to continue using long term due to the specific subscription mode

Speedy Boats is seeking a new way to manage resources coming in and out of the company, including employee time management, raw materials, turnkey solutions, and internal resources.

### 2.0 Project Objectives

The new system to be created should:

* Be easy to use, such that employees can be taught to use the software within a small period of time
* Be lower-cost to maintain than the current system
* Have several layers of protection to avoid both accidental and malicious data tampering/loss
* Be more efficient at accomplishing data entry, invoicing, creating purchase orders and creating after action reports of projects.

The objectives should be met via a software solution accessible from standard, off the shelf Windows computers.

### 3.0 Current System

The current system is a custom created version of E2 Manufacturing build. It suffers from a dated user interface that does not employ any sort of current design patterns. As such, many employees significantly struggle to use it. Many complex features of the E2 software goes unused because employees do not understand how to use them. As well, the current licensing scheme is increasing exponentially and continuing to use E2 will prove too costly for Speedy Boats.

Another major drawback of the system is a significant period of time that is required for data entry. The system is meant to allow for quick lookups of materials throughout the company, but the majority of time is spent *entering* data. As well, since the data is all manually entered, it is often prone to errors which lead to further wasted time.

### 4.0 Intended users and their interaction with the system

The intended users of the system are as follows:

* Bookkeeping
* Management
* Sales
* Engineering
* Purchasing

Bookkeepers need to be able to easily search for and input financial information for accounting and tax auditing purposes.

Management needs full access to software acting as a high level administrator being able to edit and manage employee profiles and have full access to all portions of data entry.

Sales team needs to be able to create financial quotes based on customer specification for the boat order. Have access to previous boat purchases and quotes as well as data pertaining to materials cost.

Engineering team needs to be able to search and upload files, and full access to all forms of data entry, boat pricing, part materials information, etc.

Purchasing team needs to be able to efficiently create and search lists of manufacturers, their contact information, pricing and the products the manufacturers carry.

### 5.0 Known interaction with other systems within or outside the client organization

The system will include various PC terminals including:

* A centralized server
* A PC terminal for each user (includes all office staff, approximately 12 people)
* An offsite backup system

### 6.0 Known constraints to development

Different company roles require access to different information presented in different formats.

Information being held in the system is sensitive and thus access control, security, data safety, and regular backups are required. All hosting will be done on site.

The software will be used on standard office computers with Windows 7 or 10, full compatibility with both is required.

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### 7.0 Project Schedule

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **ID** | **Task** | **Start Date** | **End Date** | **Duration** | **Assigned To** | **Completion** |
| 1 | Release RFP to market | Sept 4 | Sept 18 | 14 Days | Speedy Boats | 100% |
| 2 | Requirement Document 1.0 | Sept 18 | Oct 2 | 14 Days | Developer | 0% |
| 3 | Requirement Document 1.1  (Client response) | Oct 2 | Oct 4 | 2 Days | Speedy Boats | 0% |
| 4 | Requirement Specification Document 0.9(Draft) | Oct 4 | Oct 10 | 6 Days | Developer | 0% |
| 5 | Requirement Specification Document 1.0(Final) | Oct 4 | Nov 11 | 38 Days | Developer | 0% |
| 6 | Requirement Specification Document 2.0 | Oct 30 | Nov 26 | 27 Days | Developer | 0% |
| 7 | Prototype Demonstration | Nov 1 | Nov 30 | 29 Days | Developer | 0% |
| 8 | Prototype Feedback | Nov 30 | Dec 2 | 3 Days | Speedy Boats | 0% |
| 9 | Final Demo | Dec 3 | Dec 5 | 2 Days | Developer | 0% |

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### 8.0 Project Team

Marcin Leciej | UX Expert

Geoffrey Harper | Materials Engineer

Oleg Matveenko | Electrical Engineer

Adebayo Ogunmuyiwa | Sales Expert

Bokyung Chung | Analyst

Eric May | Project Manager

Dusty Miller | Domain Expert

Emily Sluis | Communications Specialist

### 9.0 Glossary of terms

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| --- | --- |
| Turnkey Solution | A solution that is ready to be used “out of the box”. |
| ERP | Short for “Enterprise Resource Planning”. Software for a business to help the company manage resources such as raw materials, labour, designs, etc. |
| E2 Manufacturing | A specific offering of ERP software that is created by Shoptech Canada. |
| RHIB | Rigid hull inflatable boat |