



# IT & PROCESS ASSESSMENT PROPOSAL

As Presented on: 08/25/2025



# Strategic Goals



- Cost Optimization
- Streamlined Operations
- Improved Customer Satisfaction

Every evaluation and recommendation will be based upon these strategic goals.  
These are to be defined during kick-off

# Business

# Objectives



- **Achieve competitive advantages**  
*Study current manufacturing (including Advance Mfg.), Operational processes, Finance, & People. Document futuristic outline of to-be state including Pallet Pooling (In-network, Out-of-Network, Asset Management, & Asset Recovery)*
- **Enhanced Operational Efficiency**  
*Identify the existing IT landscape and propose the optimized utilization of machines and personnel to get the max productivity.*
- **Real-time Visibility**  
*Measure and strategize the automation opportunities. Let machines talk to machines and allow humans to do more thinking.*
- **Standardization and Compliance**  
*Set IT Infra and Systems in a mode that they play a great support role to make all operations smooth and hassle-free.*

Every evaluation and recommendation will be based upon these strategic goals.  
These were refined after assessment kick-off

# DEFINE IT LANDSCAPE



STREAMLINED  
OPERATIONS



COST  
OPTIMIZATION



IMPROVED  
CUSTOMER  
SATISFACTION



## ACHIEVE COMPETITIVE ADVANTAGES

Study current manufacturing (including Advance Mfg.), Operational processes, Finance, & People. Document futuristic outline of to-be state including Pallet Pooling (In-network, Out-of-Network, Asset Management, & Asset Recovery)



## ENHANCED OPERATIONAL EFFICIENCY

Identify the existing IT landscape and propose the optimized utilization of machines and personnel to get the max productivity.



## REAL-TIME VISIBILITY

Measure and strategize the automation opportunities. Let machines talk to machines and allow humans to do more thinking.



## STANDARDIZATION AND COMPLIANCE

Set IT Infra and Systems in a mode that they play a great support role to make all operations smooth and hassle-free.







## STRATEGIC (7 Weeks)

Identify Process and Integration Opportunities on a strategic level.

### Includes:

- Org Chart by Dept
- Skill Gap Assessment,
- Employee Productivity Tracking,
- Office Location / Space,
- ESG:
  - Waste Management, Workplace Hygiene, CSR Initiatives,
- New Innovations and Ideas,
- Monetization of data from current operations,
- Risk Assessment,
- Quality Process,
- Finance Process,
- Real-Time Data Visibility, Spend Analytics, Sales Analytics, Customer Feedback Analytics, Single Source of Truth

**PL SPOC: Marty, Ariette & Todd**

**NL: Anurag Jain, Kashish, Adarsh**

# ASSESSMENT LANDSCAPE



## PAYMENTS, LOANS & RECOVERY (7 Weeks)

- Business Processes
- Omni-channel Retail Experience,
- Payment Integrations,
- Sales, Order processing,
- Pallet Rental Operations (rental agreements, billing, security deposits, insurance, etc.),
- Pallet configurations
- CRM (Leads, Customer Service, etc)

**SPOC: Lesley**

**NL: Kranti**

## SAP (3 Weeks)



Includes: Ensuring all all associated SAP modules are covered by vendors as required

**SPOC: Auritas, Senitronm Jack, Ariette. NL: Sujit**



## IT INFRASTRUCTURE (7 Weeks)

Analysis of IT across people, systems, strategy, delivery, and technology

### Includes:

- Hardware (Local, Cloud, Desktops, Laptops),
- Software,
- Networking,
- Data Storage,
- Backoffice Operations
- Office Equipment,
- Integrations,
- Customer Portal, Vendor Portal,
- HR & Payroll Systems,

**SPOC: Jack, Robert**

**NL: Anurag Jain**



## SECURITY (3 Weeks)

**Includes:** Data protection, Intellectual Property, Cybersecurity, Disaster Recovery, Physical Security

**SPOC: Jack, Robert, Jim & Ariette. NL: Anurag Jain**



## SUPPLY CHAIN (6 Weeks)

**Includes:** Inventory Management, Asset Tracking, Customer and Supplier Scorecards, Logistics Tracking, Blockchain based Traceability (Track n Trace), Barcode and RFID Tracking, Management of stockout situations, Management of excess inventory

**SPOC: Ellwood / Lesley / Jim**

**NL: Kranti**



## MANUFACTURING (6 Weeks)

Material to Finished Goods Management, Scrap Analytics, Black order management, MES (Digital Job cards, Machine Metrics), Utilize Machine data, Equipment Monitoring & OEE, Real-time Material Consumption, PLC Integration of Machines

**SPOC: Richard Park / Raghav,**

**NL: Kranti**

SETTING CONTEXT

# SCOPE BOUNDARIES

The proposed assessment will cover a detailed study of existing processes around manufacturing, sales & distribution, warehouse management, materials management, production planning, plant maintenance and finance/controlling.

The scope will also cover a study of existing interfacing systems and business strategy with high focus on IT.

Assessment outcome will be a detailed assessment report and a blueprint document for effective IT landscape with

- A proposed Infrastructure with licensing requirements wherever possible
- A roadmap plan for integrating peripheral IT systems and automation tools.

# ASSESSMENT TEAM



**Kannav Sharma**  
Executive Sponsor

**Samar Qureshi**  
Governance

**Prakash Motwani**  
Lead Assessor

**Business Analysts**

**Technical Experts**

**PMO & Governance**

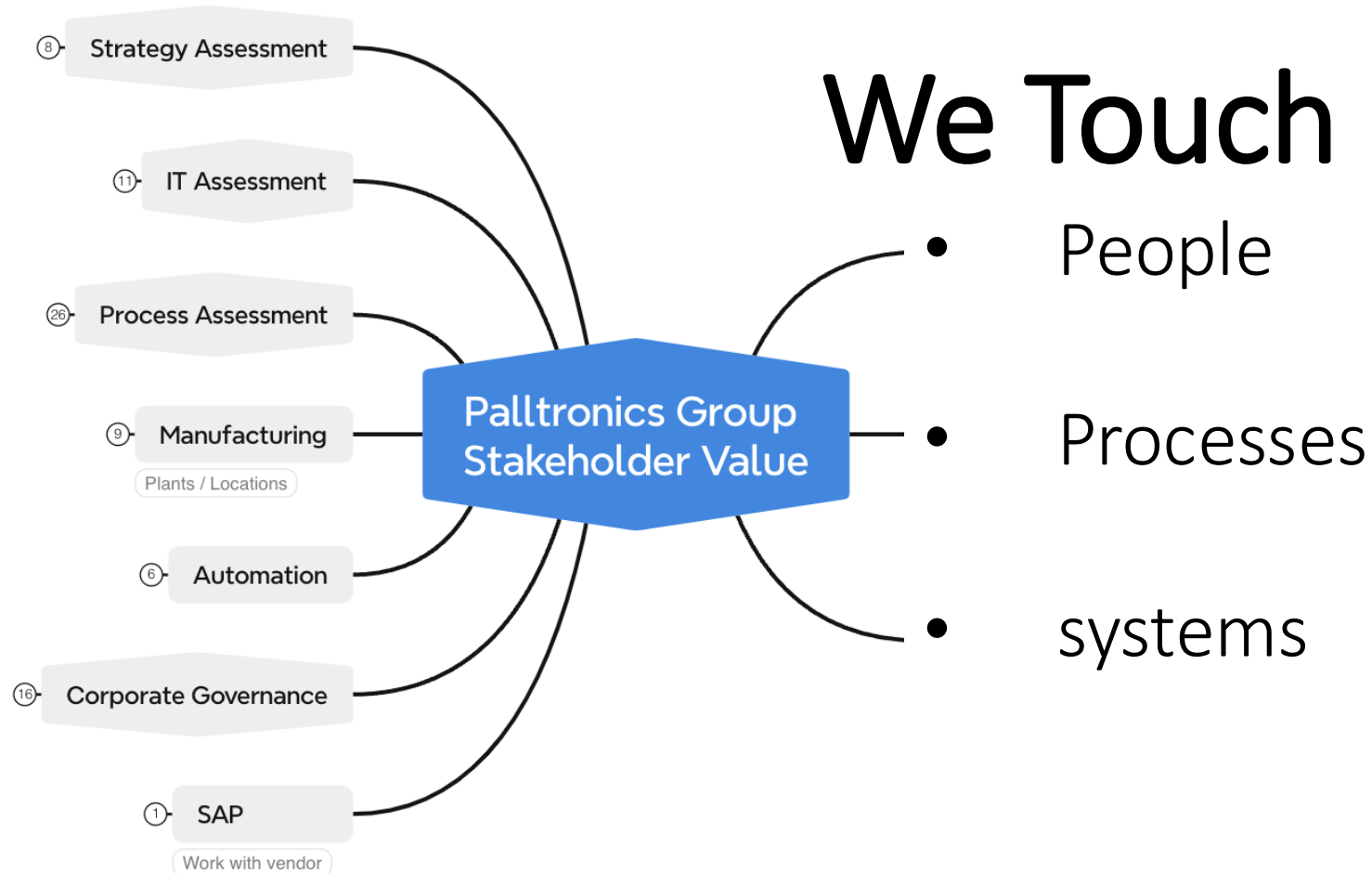
- Kashish Keswani  
Data
- Rizwan Siddiqui  
SAP S4/HANA
- Sailendra GS  
Data
- Priyanka Mehta  
Infra
- Arun Sahu  
Data
- Mukesh Sharma  
AI
- Vaibhav Sharma  
Data

- Sujit Sharma  
SAP S4/H...
- Ankit Agrawal  
Sr. Architect
- Kunain Imam  
Finance E...
- Anukul Chourey  
Sr. Architect
- Manoj Patel  
Technical ...
- Hemendra Dhakaita  
Oracle
- Harshvardhan  
Oracle
- Vikas Kag  
JAVA

- Kranti Batchala  
ERP SME
- Anurag Jain  
IT Infra SME
- Ayushi Sharma  
IT Infra SME
- Adarsh Jaish  
PMO
- Rahul Soni  
Data PMO
- Saurabh Mishra  
Data PMO
- Aditya Vyas  
Marketin

# How we do it?

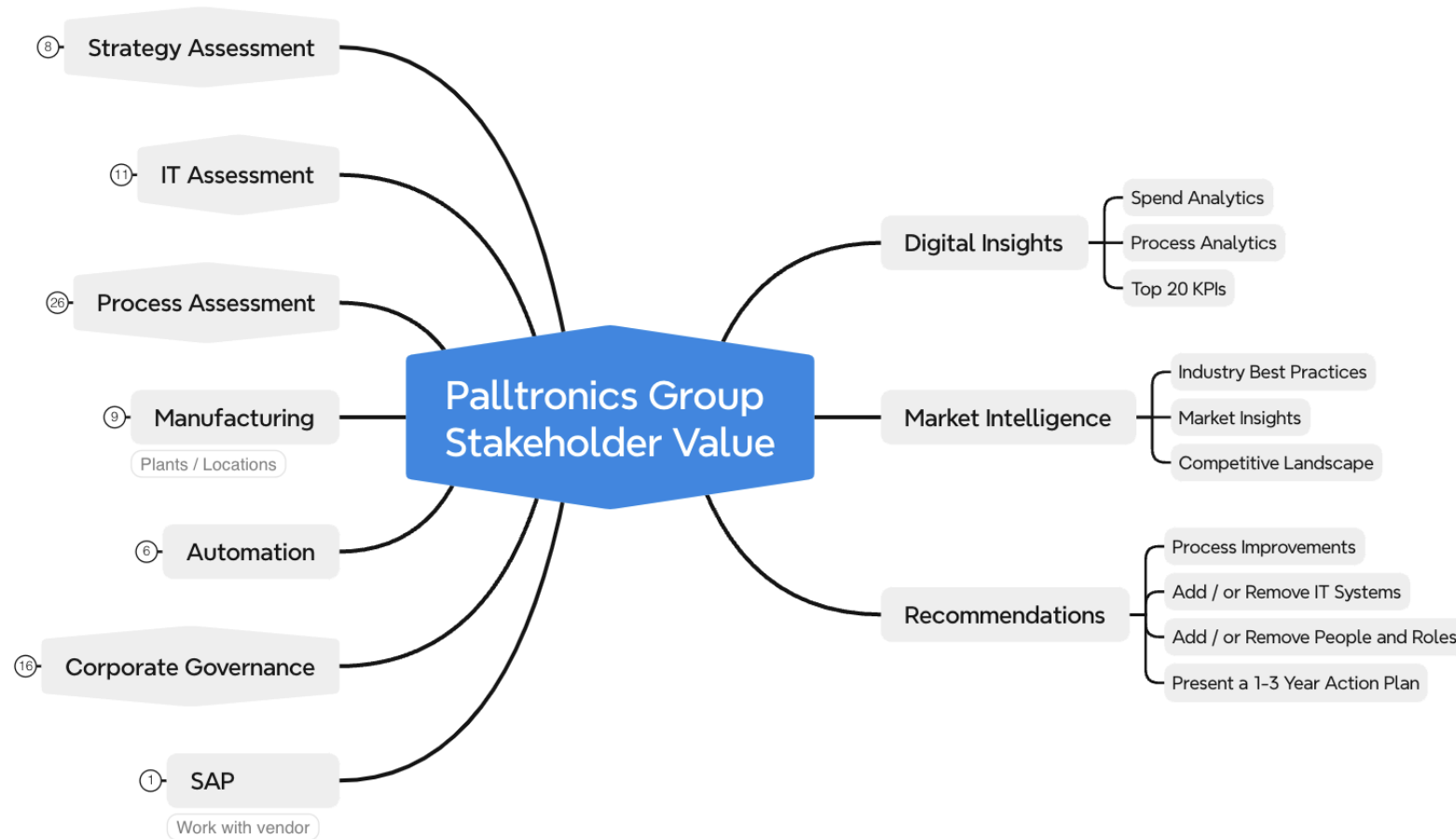
How we do it?





# How we do it?

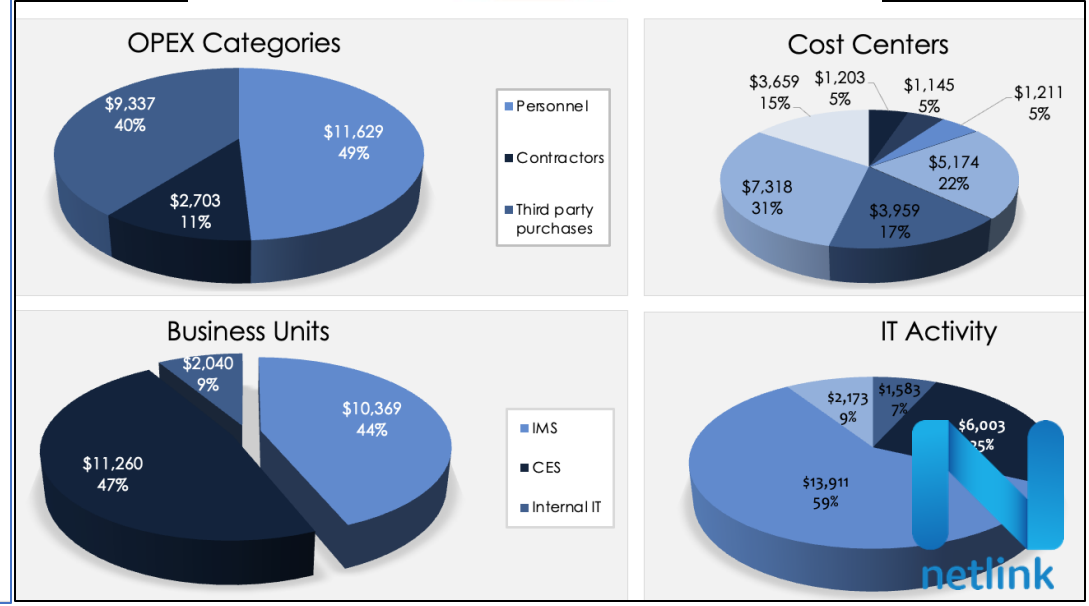
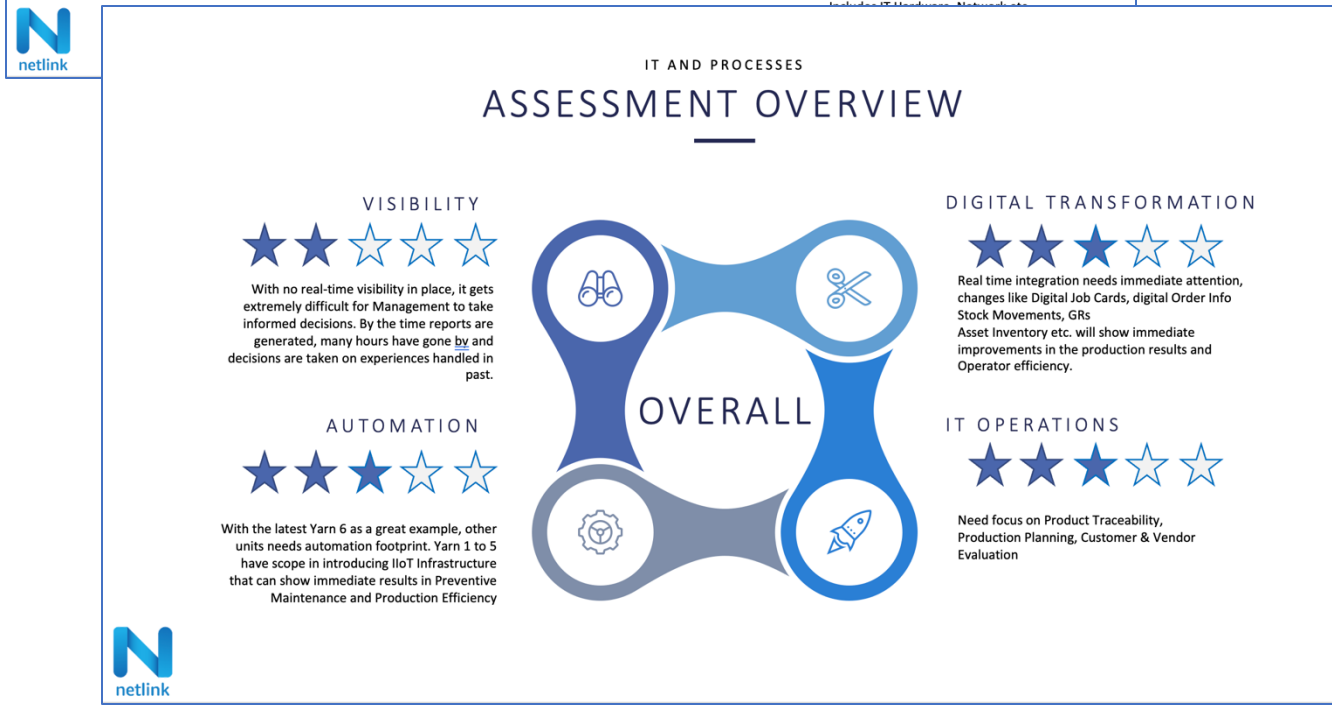
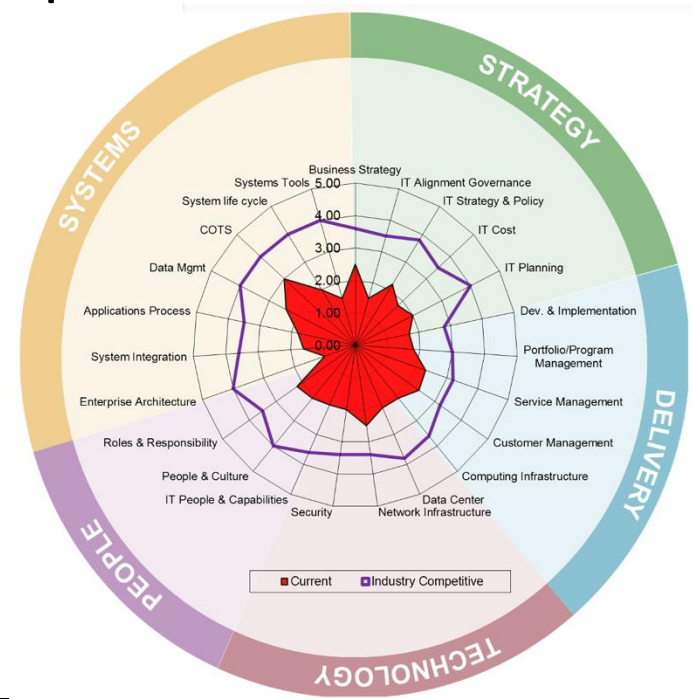
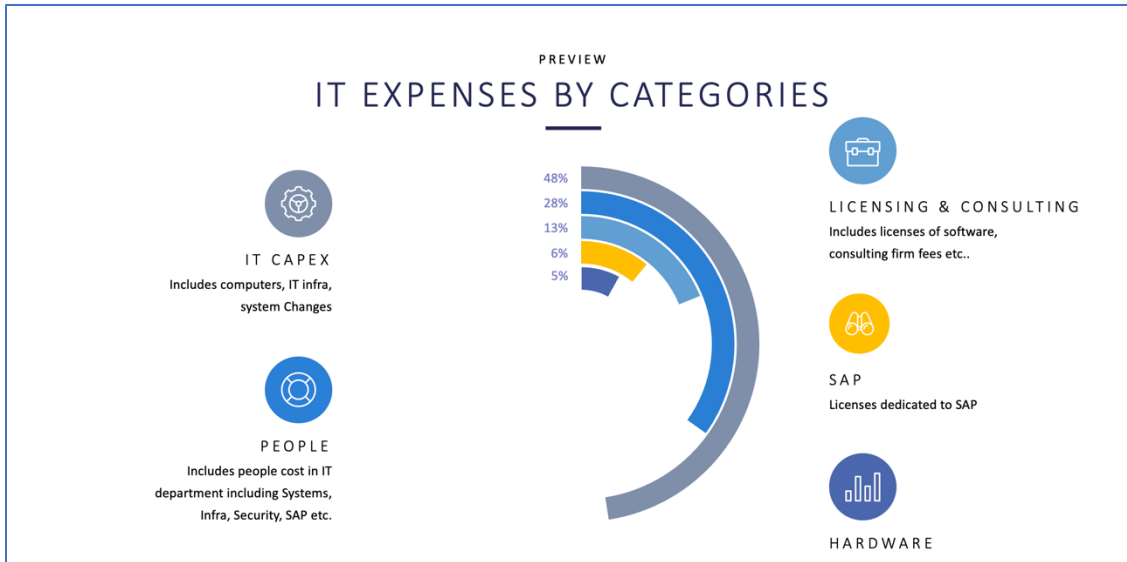
# Results?



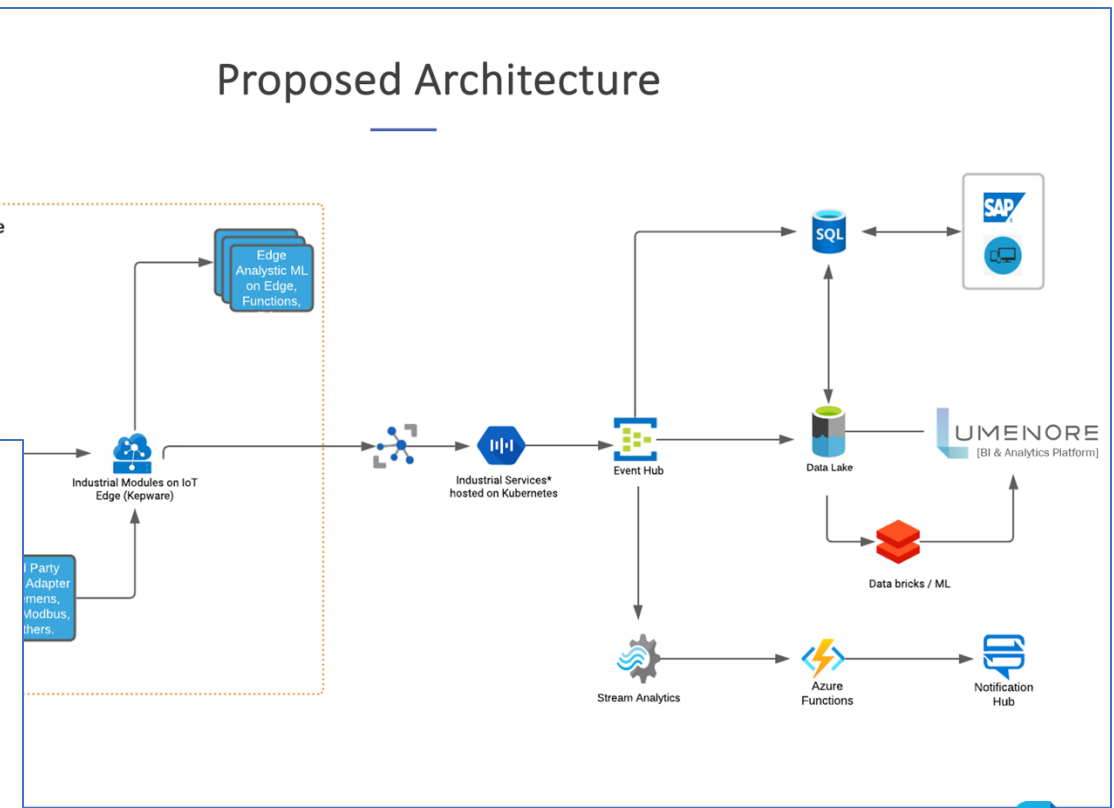
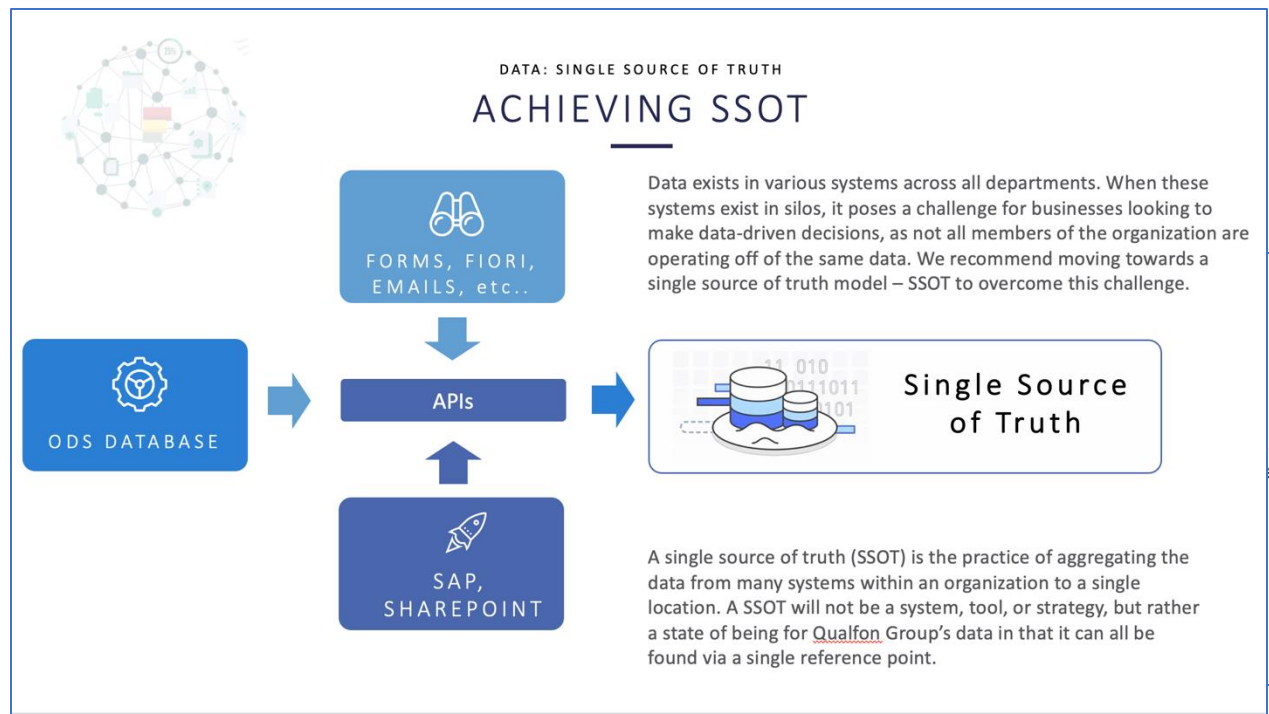
# Units in Assessment Scope

- Manufacturing – North Carolina
- Advanced Mfg & Innovation Center
- Sales & HQ – Orlando
- 20~30 Warehouses in next 3 years

# How does our assessment reports looks like?

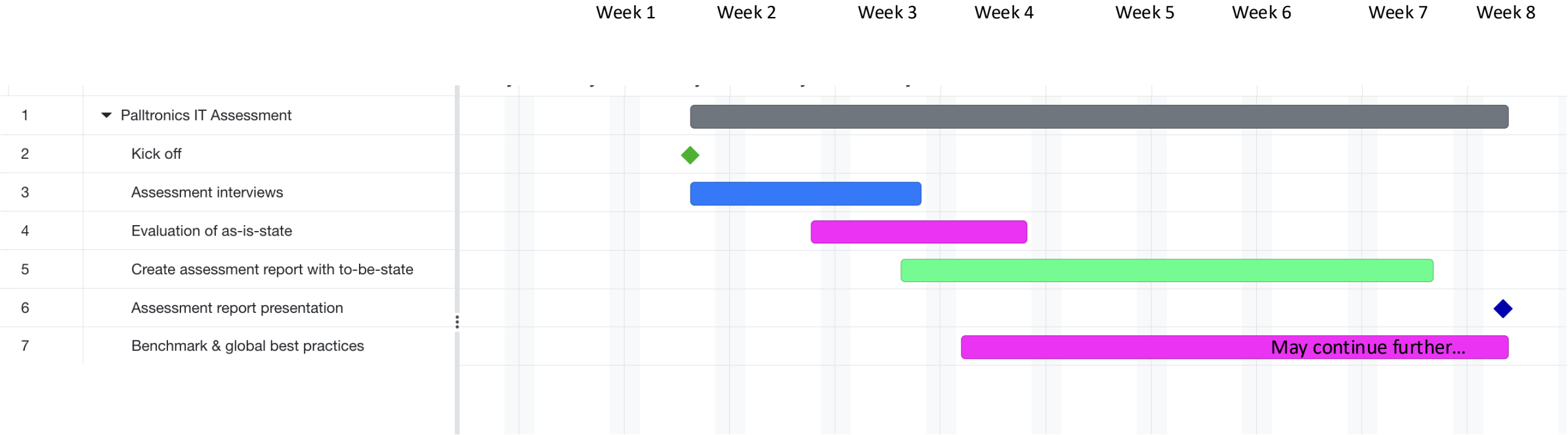


# How does our assessment recommendations looks like?





# Assessment Plan



Follow true agile and collaborative process.

# How does our assessment surveys looks like?



## IT System Assessment Checklist

### 1. Hardware Infrastructure:

- Servers: Assess the condition, capacity, and performance of servers hosting critical applications and databases.
- Workstations: Evaluate the performance and configuration of employee workstations to ensure they meet operational needs.
- Networking Equipment: Check routers, switches, firewalls, and other networking devices for performance, security, and capacity.
- Storage Systems: Review the storage infrastructure to ensure adequate capacity, performance, and data redundancy.
- Backup Systems: Verify the effectiveness of backup systems, including frequency, data integrity, and disaster recovery procedures.

### 2. Software Systems:

- Enterprise Resource Planning (ERP) System: Evaluate the functionality, customization, and integration of the ERP system with other business processes.
- Manufacturing Execution System (MES): Assess the MES for efficiency, accuracy, and integration with production equipment.
- Customer Relationship Management (CRM) System: Review



2. Are there any customizations or integrations with these systems?
3. How are software licenses managed and monitored for compliance?
4. What measures are in place to ensure the security of software systems?
5. How are software updates and patches applied?

### Security and Compliance:

1. What measures are in place to protect the network from external threats?
2. How is data security ensured, including encryption and access controls?
3. Does the company comply with relevant industry regulations and standards? (e.g., ISO 9001, ISO 27001)
4. Describe the company's security policies and procedures.
5. How often are security audits conducted, and what are the findings?

### Business Continuity and Disaster Recovery:

1. Is there a documented disaster recovery plan in place?
2. How often is the disaster recovery plan tested, and what are the results?
3. Are critical systems and data replicated or backed up offsite?
4. What measures are in place to minimize downtime during a disaster?

# What help we need:

- Access to team members in Factory/Plant/Location premises
- Full support and mandate from Palltronics leadership for each unit point of contact in assessment scope to give time and support in obtaining the data
- Internet access in office locations where requested
- Ability to record the meetings and take notes and assets
- Ability to book conference room to host the assessment team upon request

# COMMERCIAL PROPOSAL FOR IT ASSESSMENT

S.No.	Name	Role	Title	Location	Est Engagement Duration
1	Kannav Sharma	Executive Sponsor	CFO	Onsite/Offsite	2 Weeks
2	Samar Qureshi	Program Governance	Executive Vice President, Digital Transformation	Onsite/Offsite	2 Weeks
3	Prakash Motwani	Lead Assessor	Executive Vice President, Tech	Onsite/Offsite	7 Weeks
4	Kranti Batchala	Subject Matter Expert	Associate Vice President, Enterprise Applications	Onsite/Offsite	6 Weeks
5	Kashish Keswani	Analytics Expert	Director, Data Services	Onsite/Offsite	3 Weeks
6	Rizwan Khan	SAP S4/HANA Business Process Analyst	Project Manager, SAP	Onsite/Offsite	3 Weeks
7	Sujit Sharma	SAP S4/HANA Architect	Sr. Solutions Architect, SAP	Onsite/Offsite	3 Weeks
8	Anurag Jain	IT Systems Analyst	Vice President, IT Infrastructure	Onsite/Offsite	7 Weeks
9	Ankit Agrawal	Technical Analyst	Sr. Solutions Architect, Digital Transformation	Offsite	7 Weeks
10	Adarsh Jaish	PMO	Vice President, Digital Transformation	Offsite	7 Weeks
11	Balu Mahesh	Business Systems Analyst	Business Analyst	Offsite	7 Weeks
12	Prakash Narang	IT Project Manager	Project Manager, IT Infrastructure	Offsite	6 Weeks
13	Shikhar Thareja	Business Analyst	Business Analyst	Offsite	5 Weeks
14	Shristhi Dubey	Technical Writer	Technical Writer	Offsite	6 Weeks

**Total billing value: ~~\$224,000~~ \$194,000 for the period: 7-Sep-2025 till 30-Oct-2025**

**Note:**

1. All these proposed resources will be provided by Netlink on remote or onsite basis as required. On need basis, Lead Assessor will coordinate their visits to onsite / plant locations.
2. Prices exclusive of any applicable taxes.





Start an *Awesome*  
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