☎️ Call Navigation Framework – Vision Planning Session #1

Client: MGC Supplies
Prepared by: Enable Solutions

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1. 🎯 Call Objectives

- Validate current manual processes (Odoo → Zoho transition).

- Prioritize **short-term wins** (invoicing, purchase orders, commissions, bookkeeping setup).

- Capture **long-term roadmap goals** (reps/customer portals, automation, payments).

- Confirm decision-making process for platform rollout.

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2. 📋 Structured Agenda

00:00 – 05:00 | Welcome & Context

- Reconfirm scope of engagement ($997 Vision Planning).

- Set expectations: "We'll define both **quick wins** and **12-month roadmap** today."

05:00 – 20:00 | Current Workflow Review

- Walk through attached **order** and **purchase order** samples.

- Identify bottlenecks: 30 minutes/order, manual PO creation, Wave bookkeeping.

- Clarify role of sales reps and commission calculations.

20:00 – 35:00 | Short-Term Priorities Deep Dive

- Quoting & Invoicing (replicating Odoo, PDF output).

- Purchase Orders (auto-create with vendor info).

- Commissions (multi-rep, % rates, monthly payouts, 1099 tracking).

- Bookkeeping (Wave vs Zoho Books transition).

35:00 – 50:00 | Long-Term Vision Mapping

- Reps portal: self-service quoting & commission visibility.

- Customer portal: ordering, tracking, payment visibility.

- Integration priorities: PaymentCloud, DocuSign-style forms.

- Automation ideas: reducing 30-min order processing to <10 mins.

50:00 – 55:00 | Decision Checkpoints

- Which **short-term priorities** must be operational in next 90 days?

- Which **roadmap features** are "nice-to-have" vs "must-have"?

- Budget / resource alignment (Michael mentioned ~$10k available).

55:00 – 60:00 | Wrap & Next Steps

- Confirm deliverables: Decision Pathway Guide + Roadmap draft.

- Assign action items (Enable: roadmap draft, Client: confirm PaymentCloud docs).

- Schedule next Vision Planning session.

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3. 🧭 Navigation Prompts (For Facilitator)

- "If each order takes 30 minutes now, what does success look like with automation?"

- "Would you prefer sales reps to **enter data** in CRM or only **see reports**?"

- "How do you want customers to experience ordering and payments — **self-service** or **managed**?"

- "If commissions are miscalculated, what's the impact? Is this the **#1 automation priority**?"
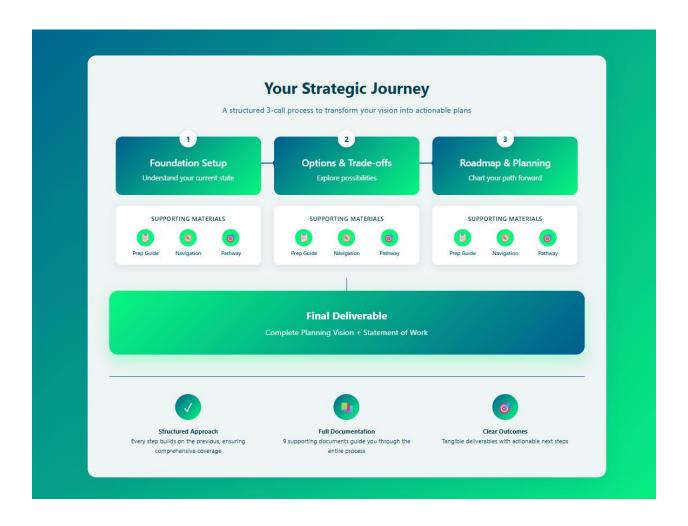
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4. ✅ Call Outcomes

By end of session, we should have:

- **List of short-term deliverables**: invoicing, POs, commissions, bookkeeping.

- **Draft roadmap outline**: portals, automation, PaymentCloud integration.

- **Agreed success metrics**: reduce order processing time, automate commissions, enable clean bookkeeping handoff.

- **Confirmed ownership**: Michael = decision maker, Enable = roadmap + setup guide.

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Your Strategic Journey

A structured 3-call process to transform your vision into actionable plans

1

Foundation Setup
Understand your current state

2

Options & Trade-offs
Explore possibilities

3

Roadmap & Planning
Chart your path forward

SUPPORTING MATERIALS

Prep Guide   Navigation   Pathway

SUPPORTING MATERIALS

Prep Guide   Navigation   Pathway

SUPPORTING MATERIALS

Prep Guide   Navigation   Pathway

Final Deliverable

Complete Planning Vision + Statement of Work

Structured Approach
Every step builds on the previous, ensuring comprehensive coverage

Full Documentation
9 supporting documents guide you through the entire process

Clear Outcomes
Tangible deliverables with actionable next steps