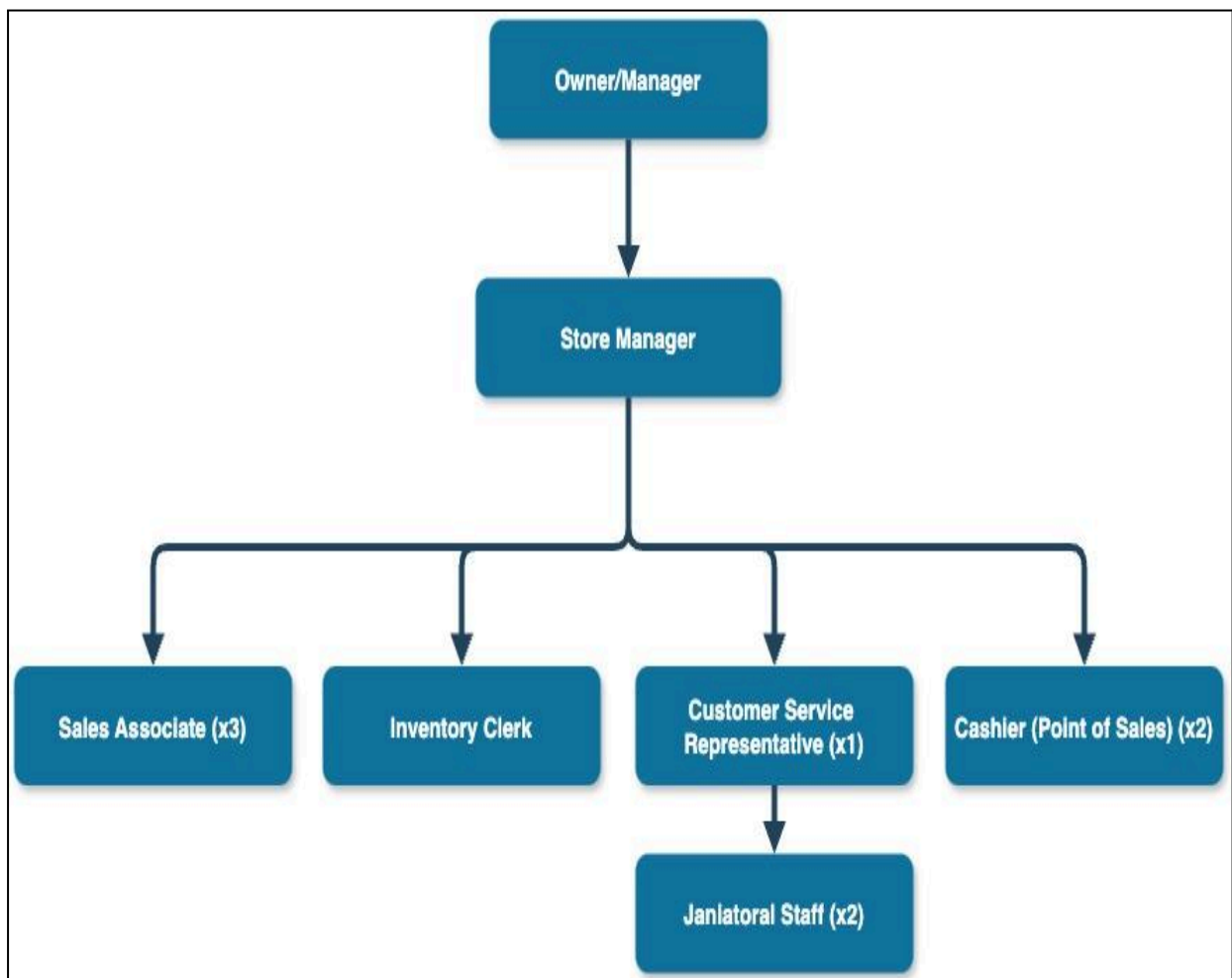A Project Proposal for

"Digital Transformation with

Integrated Management Software

for a Small Business"

1. Organization
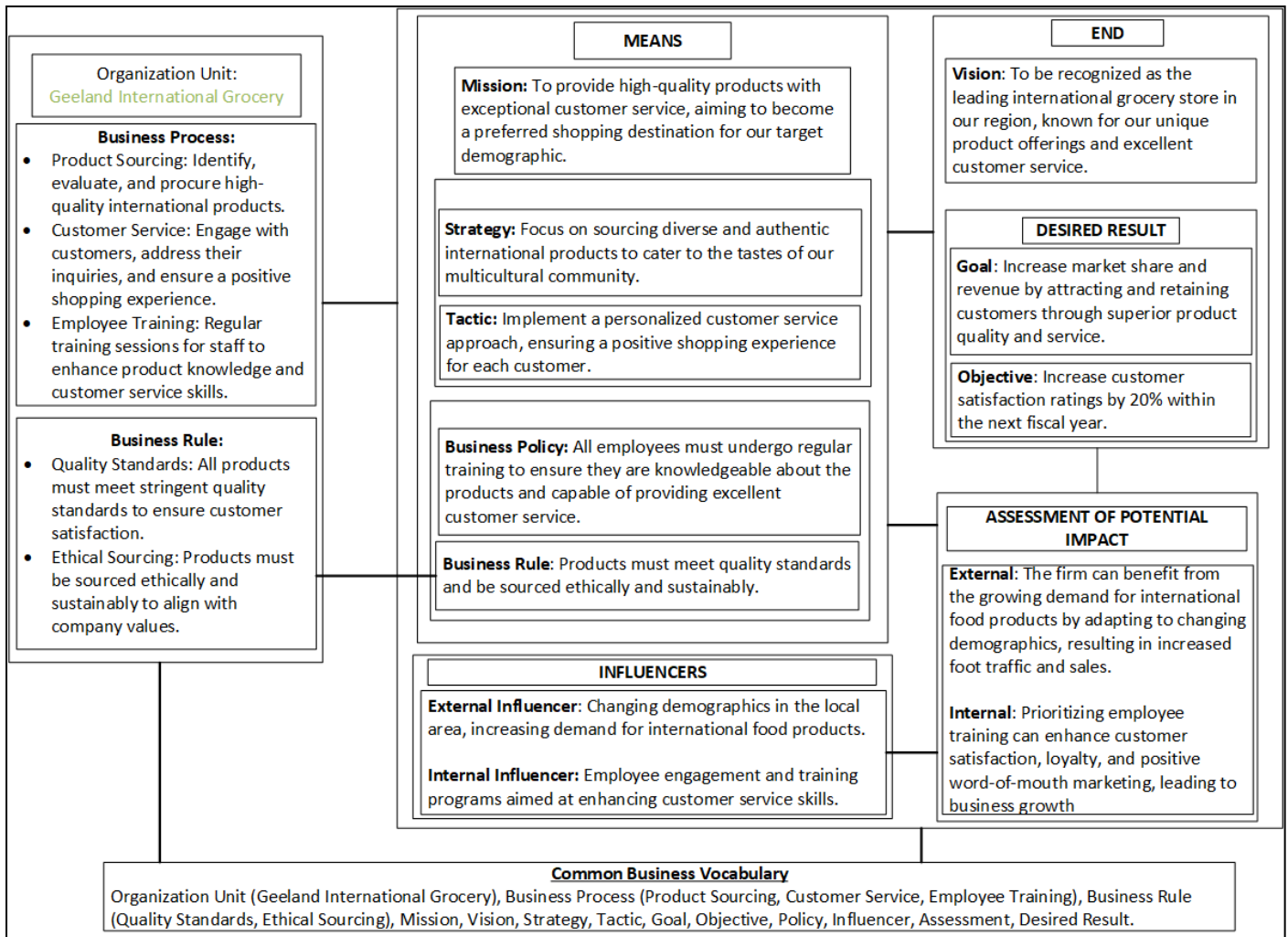
- **Context and general information**
  Geeland International Grocery is a family-owned and operated grocery store located at 1620 Walkley Road in Ottawa, Ontario. As a specialty grocery store, Geeland International Grocery prides itself on offering a diverse selection of international food products, catering to the multicultural community in Ottawa, and providing a unique shopping experience for customers seeking authentic global flavors.

  - **Industry, economic group, competitors, incumbents**.
    - Industry: Retail

    - Economic group: Small to Medium-sized Enterprises(SMEs)

    - Competitors: Local retail chains, online retailers

    - Incumbents: Walmart, Costco

  - **Organization chart, employee count, branches, locations.**

    - Employee Count: 11 Employees

    - Branches: One main retail store

    - Locations: 1620 Walkley Road, Ottawa, ON K1V 6P5
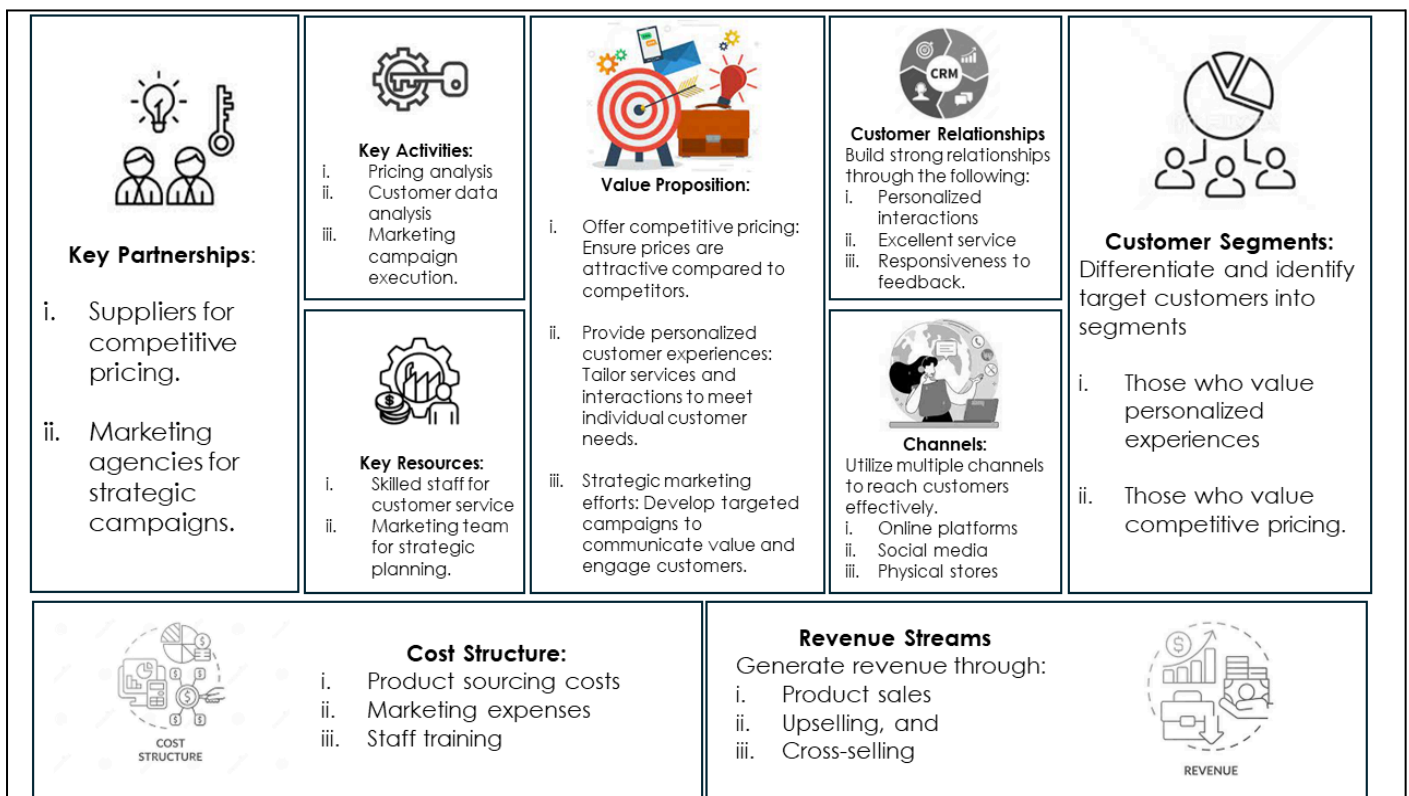
    - Organization Chart:
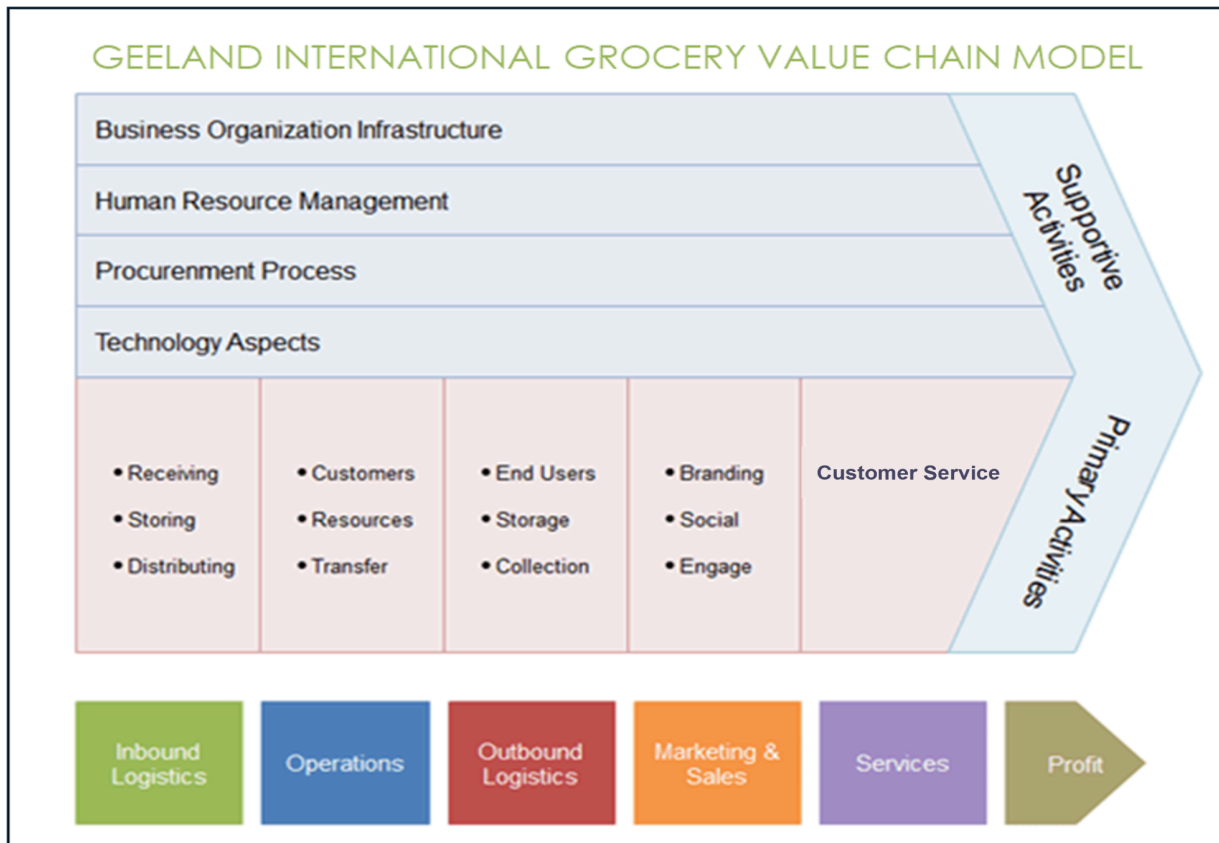

- **Business strategy**

1. Business Motivation Model (BMM)

Organization Unit:
Geeland International Grocery

Business Process:
- Product Sourcing: Identify, evaluate, and procure high-quality international products.
- Customer Service: Engage with customers, address their inquiries, and ensure a positive shopping experience.
- Employee Training: Regular training sessions for staff to enhance product knowledge and customer service skills.

Business Rule:
- Quality Standards: All products must meet stringent quality standards to ensure customer satisfaction.
- Ethical Sourcing: Products must be sourced ethically and sustainably to align with company values.

MEANS

Mission: To provide high-quality products with exceptional customer service, aiming to become a preferred shopping destination for our target demographic.

Strategy: Focus on sourcing diverse and authentic international products to cater to the tastes of our multicultural community.

Tactic: Implement a personalized customer service approach, ensuring a positive shopping experience for each customer.

Business Policy: All employees must undergo regular training to ensure they are knowledgeable about the products and capable of providing excellent customer service.

Business Rule: Products must meet quality standards and be sourced ethically and sustainably.

INFLUENCERS

External Influencer: Changing demographics in the local area, increasing demand for international food products.

Internal Influencer: Employee engagement and training programs aimed at enhancing customer service skills.

END

Vision: To be recognized as the leading international grocery store in our region, known for our unique product offerings and excellent customer service.

DESIRED RESULT

Goal: Increase market share and revenue by attracting and retaining customers through superior product quality and service.

Objective: Increase customer satisfaction ratings by 20% within the next fiscal year.

ASSESSMENT OF POTENTIAL IMPACT

External: The firm can benefit from the growing demand for international food products by adapting to changing demographics, resulting in increased foot traffic and sales.

Internal: Prioritizing employee training can enhance customer satisfaction, loyalty, and positive word-of-mouth marketing, leading to business growth

Common Business Vocabulary

Organization Unit (Geeland International Grocery), Business Process (Product Sourcing, Customer Service, Employee Training), Business Rule (Quality Standards, Ethical Sourcing), Mission, Vision, Strategy, Tactic, Goal, Objective, Policy, Influencer, Assessment, Desired Result.

2. Canvas

Key Partnerships:
i. Suppliers for competitive pricing.
ii. Marketing agencies for strategic campaigns.

Key Activities:
i. Pricing analysis
ii. Customer data analysis
iii. Marketing campaign execution.

Key Resources:
i. Skilled staff for customer service
ii. Marketing team for strategic planning.

Value Proposition:
i. Offer competitive pricing: Ensure prices are attractive compared to competitors.
ii. Provide personalized customer experiences: Tailor services and interactions to meet individual customer needs.
iii. Strategic marketing efforts: Develop targeted campaigns to communicate value and engage customers.

Customer Relationships
Build strong relationships through the following:
i. Personalized interactions
ii. Excellent service
iii. Responsiveness to feedback.

Channels:
Utilize multiple channels to reach customers effectively.
i. Online platforms
ii. Social media
iii. Physical stores

Customer Segments:
Differentiate and identify target customers into segments
i. Those who value personalized experiences
ii. Those who value competitive pricing.

Cost Structure:
i. Product sourcing costs
ii. Marketing expenses
iii. Staff training

Revenue Streams
Generate revenue through:
i. Product sales
ii. Upselling, and
iii. Cross-selling

3. Value System Model

GEELAND INTERNATIONAL GROCERY VALUE CHAIN MODEL

Supportive Activities
Business Organization Infrastructure
Human Resource Management
Procurenment Process
Technology Aspects

Primary Activities

Inbound Logistics	Operations	Outbound Logistics	Marketing & Sales	Services
• Receiving	• Customers	• End Users	• Branding	Customer Service
• Storing	• Resources	• Storage	• Social	
• Distributing	• Transfer	• Collection	• Engage	

Inbound Logistics | Operations | Outbound Logistics | Marketing & Sales | Services | Profit

4. Capability Analysis

GEELAND INTERNATIONAL GROCERY CAPABILITY MODEL

GENRAL STORE OPERATIONS
- Manual Procurement Management
- Basic Inventory Management
- In-Person Sales and Marketing
- Personalized Customer Service
- Basic Financial Management

MANUAL PROCUREMENT MANAGEMENT
- Local Vendor Sourcing and Selection
- Phone/In-Person Purchase Order Processing
- Basic Import and Customs Management
- Basic Quality Assurance (Visual Inspection)
- Negotiation and Contract Management

BASIC INVENTORY MANAGEMENT
- Warehouse and Storage Organization
- Stock Counting and Replenishment
- Basic Demand Forecasting and Planning
- Product Categorization and Placement
- Expiration Date Tracking

IN-PERSON SALES AND MARKETING
- Local Market Research and Trends Analysis
- In-Store Pricing and Promotion Strategies
- In-Store Channel Management
- Basic Customer Segmentation and Targeting
- Manual Loyalty Program Management

PERSONALIZED CUSTOMER SERVICE
- In-Store Customer Assistance
- Manual Order Fulfillment and Shipping
- Returns and Refunds Management
- In-Person Customer Feedback Management
- Post-Purchase Support

BASIC FINANCIAL MANAGEMENT
- Budgeting and Forecasting
- Manual Accounts Receivable and Payable
- Cash Flow Management
- Basic Financial Reporting and Analysis
- Tax and Regulatory Compliance

2. Operations

- **Process identification**
  - **Top-level processes identification and description**

    Order-to-Cash (O2C): Geeland International Grocery engages in the O2C process by receiving customer orders, processing these orders, fulfilling them by selecting items from their inventory, generating invoices, and receiving payments at the checkout counter.
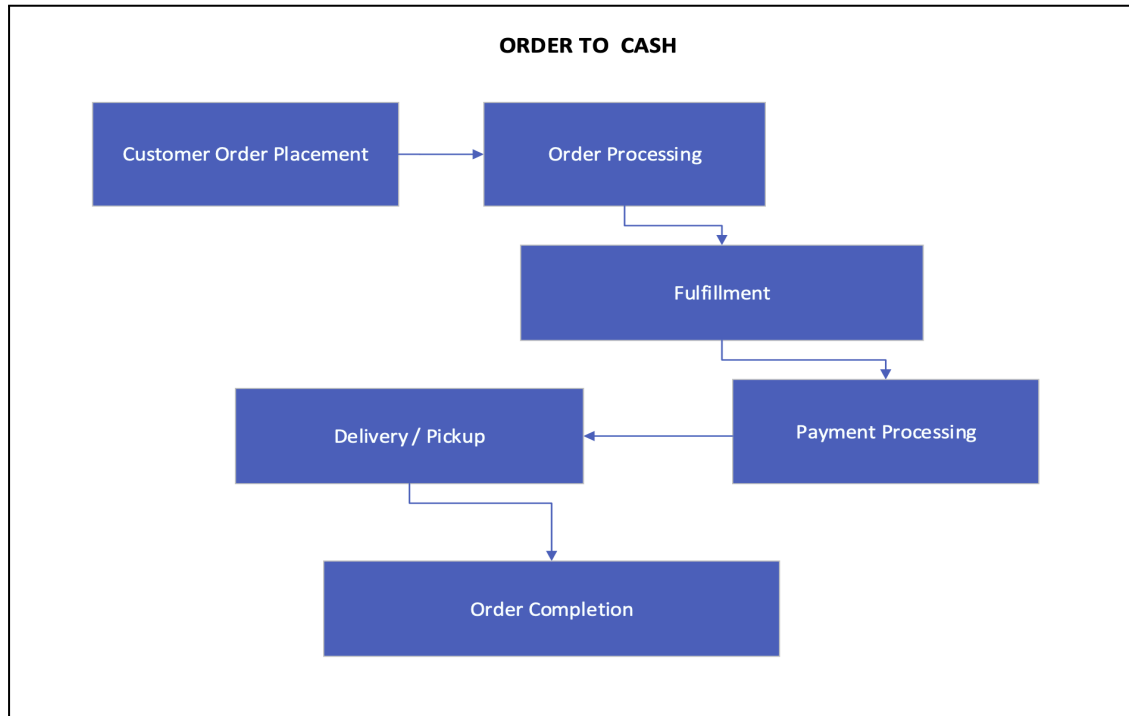
Procure-to-Pay (P2P): This process involves Geeland International Grocery acquiring goods from suppliers to stock their store shelves and then paying for these goods. For instance, they initiate purchase orders for various groceries and household items, receive deliveries from suppliers, verify the received goods, and process payments.
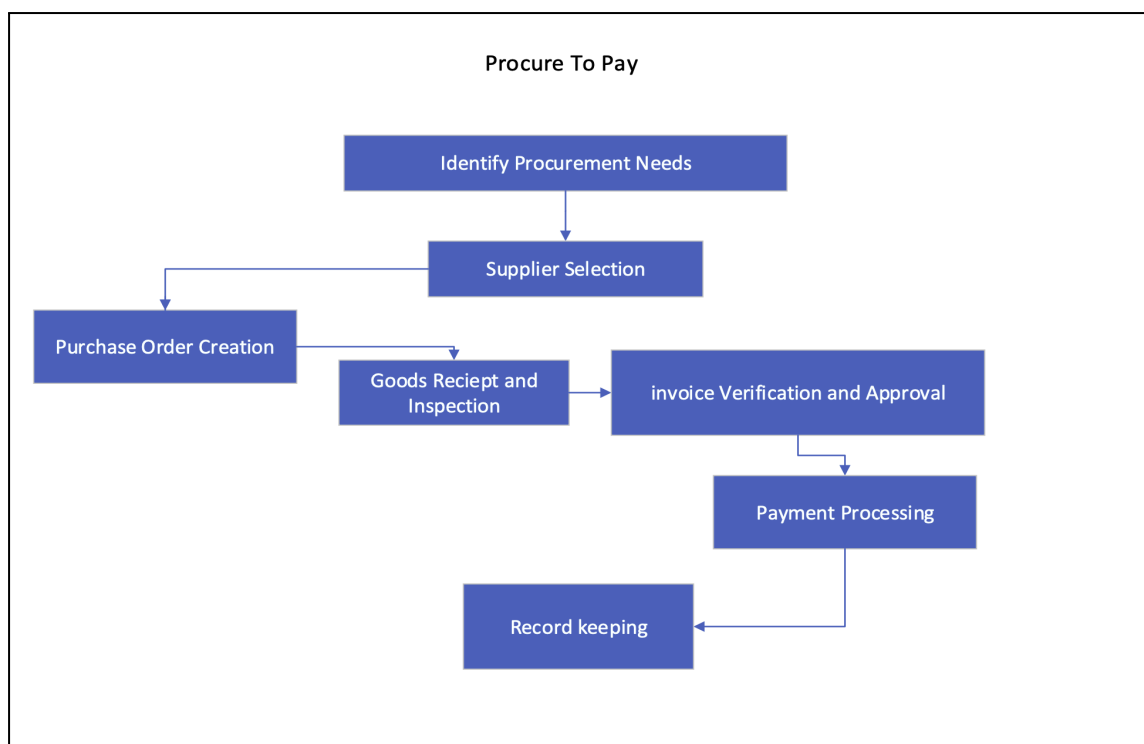
- ○ **Process mapping (strategy, core, and support processes)**

  - ■ Strategy Processes:

    Strategic Planning: Defining long-term objectives and strategies for growth, analyzing market trends, customer preferences, and competitor strategies

  - ■ Core Processes:

    Order Fulfillment: Processing customer orders, picking items, packaging, and delivery.

    Procurement: Sourcing goods from suppliers, receiving, and stocking inventory.

    Sales and Marketing: Promoting products, attracting customers, and facilitating sales transactions.

  - ■ Support Processes

    Human Resources: Recruitment, onboarding, training, and performance management of employees.

    Financial Management: Budgeting, accounting, financial reporting, and cash flow management.

    IT Support: Maintaining hardware and software systems, and troubleshooting technical issues.

- ○ **Management information systems needed per process**

  Strategy Processes: Business intelligence tools for market analysis, and strategic planning software.

  Core Processes: CRM (Customer Relationship Management) systems, inventory management software, and sales analytics tools.

  Support Processes: HRIS (Human Resource Information System) for HR management, accounting software for financial management, and helpdesk ticketing systems for IT support.

3. Database design

- ● **Entities identification**

  Product: Product_ID(PK), Name, Description, Price, Quantity, Supplier_ID(FK).

  Supplier: Supplier_ID(PK), supplierName, Contact Information.

  Customer: Customer_ID(PK), customerName, Contact Information.

  Transaction: Transaction_ID(PK), Date, Employee_ID(FK), Customer_ID(FK).

  Transaction Detail: Transaction_Details_ID(PK), Transaction_ID(FK), Product_ID(FK), Quantity, Total Price

  Employee: Employee_ID(PK), Name, Position, Department.

- ● **Entity relationship diagram.**
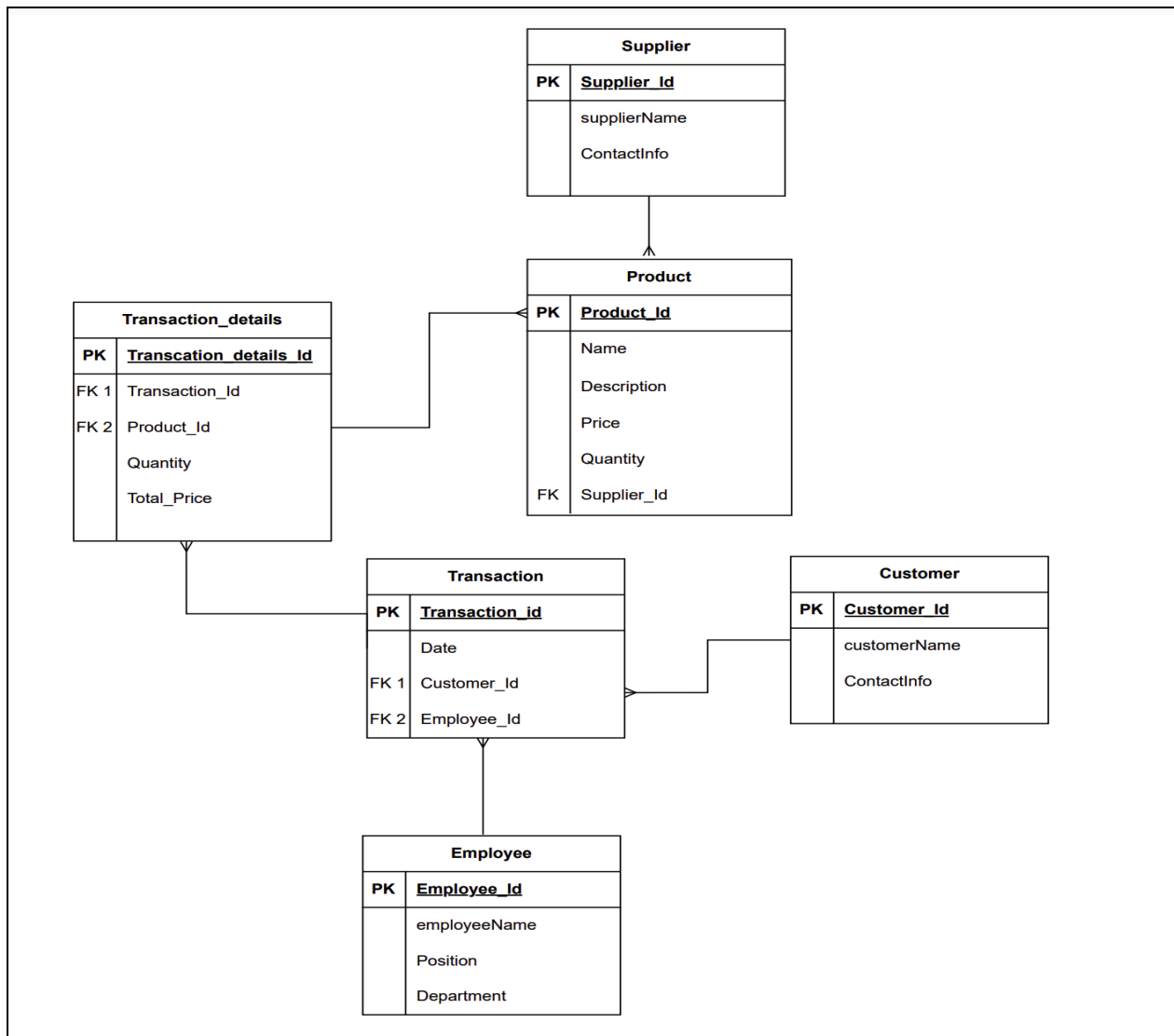
- **Database tables design.**

Product Table:

Field	Data_Type	Key	Null	Default	Description
Product_Id	INT	PK	NO		Primary Key
Name	VARCHAR(100)		NO		Product Name
Price	DECIMAL(10, 2)		NO		Product Price
Quantity	INT		NO		Available Quantity
Description	TEXT		YES	NULL	Product Description
Sipplier_Id	INT	FK	YES	NULL	Foreign Key Referencing Supplier Table

Supplier Table:

Field	Data_Type	Key	Null	Default	Description
Supplier_Id	INT	PK	NO		Primary Key
supplierName	VARCHAR(100)		NO		Supplier Name
ContactInfo	VARCHAR(255)		YES	NULL	Contact Information

Transaction Table:

Field	Data_Type	Key	Null	Default	Description
Transaction_Id	INT	PK	NO		Primary Key
Date	DATE		NO		Transaction Date
Customer_Id	INT	FK	YES	NULL	Foreign Key Referencing Customer Table
Employee_Id	INT	FK	YES	NULL	Foreign Key Referencing Employee Table

Customer Table:

Field	Data_Type	Key	Null	Default	Description
Customer_Id	INT	PK	NO		Primary Key
Name	VARCHAR(100)		NO		Customer Name
ContactInfo	VARCHAR(255)		YES	NULL	Contact Information

Employee Table:

Field	Data_Type	Key	Null	Default	Description
Employee_Id	INT	PK	NO		Primary Key
employeeName	VARCHAR(100)		NO		Employee Name
Position	VARCHAR(100)		YES	NULL	Employee Position/Title
Department	VARCHAR(100)		YES	NULL	Employee Department

Transaction Details Table:

Field	Data_Type	Key	Null	Default	Description
Transaction_details_Id	INT	PK	NO		Primary Key
Transaction_Id	INT	FK	NO		Foreign Key Referencing Transaction Table
Product_ID	INT	FK	NO		Foreign Key Referencing Product Table
Quantity	INT		NO		Quantity of Product
Total_Price	DECIMAL(10, 2)		NO		Total Price of Transaction

4. Management Information Systems

Platform:

Odoo is an open-source enterprise resource planning (ERP) software platform that offers a suite of integrated business applications designed to streamline and automate various aspects of business operations. It offers a wide range of modules covering functions such as CRM, sales, inventory management, manufacturing, accounting, human resources, and more. Odoo is highly modular and customizable, allowing businesses to select and configure the modules that best fit their needs

Selection Criteria:

Centralized Data Management: Odoo offers a centralized platform for managing sales data, inventory, and customer information. This enables Geeland International Grocery to consolidate and organize sales data in one place, facilitating easier access, analysis, and reporting.

Automated Reporting: Odoo provides automated reporting and analytics capabilities, allowing Geeland International Grocery to generate customizable sales reports quickly and accurately. This automation streamlines the reporting process, saving time and reducing the risk of errors

Advanced Analytics: With Odoo's advanced analytics tools, Geeland International Grocery can gain deeper insights into sales performance, customer behavior, and market trends. This enables the store to identify growth opportunities, optimize sales strategies, and enhance customer satisfaction.

Forecasting & Planning: Odoo's forecasting and planning features enable Geeland International Grocery to predict future sales trends, anticipate demand, and optimize inventory management. This helps the store maintain optimal stock levels, minimize stockouts, and improve overall operational efficiency.

Integration Capabilities: Odoo seamlessly integrates with other modules such as inventory management, CRM, and accounting, ensuring data consistency and accessibility across different departments. This integration enhances collaboration, streamlines processes, and improves overall business efficiency.

Main Advantages:

Integrated Platform: Odoo offers an integrated suite of business applications covering various functions such as sales, inventory management, accounting, and CRM.

Customization: Odoo is highly customizable, allowing Geeland International Grocery to tailor the system to its specific requirements.

Scalability: As Geeland International Grocery grows and expands its operations, Odoo can scale with the business.

User-Friendly Interface: Odoo features a user-friendly interface that is easy for employees to navigate and use. This ensures quick adoption and minimal training time for staff, allowing Geeland International Grocery to maximize productivity and efficiency

Cost-Effectiveness: Odoo offers a cost-effective solution compared to many other enterprise-level ERP systems. Odoo provides excellent value for small and medium-sized businesses like Geeland International Grocery

Community Support: Odoo has a large and active community of users and developers who contribute to the ongoing development and improvement of the platform. This means Geeland International Grocery can benefit from community support, resources, and extensions to enhance its Odoo implementation.

Modules identification
1. **POS System Module:**
   Geeland International Grocery lacks an efficient point-of-sale (POS) system, leading to inefficient checkout processes, limited payment options, poor inventory management, and a lack of

customization. Implementing a POS system addresses these shortcomings by providing an easy-to-use interface for employees, supporting multiple payment methods, integrating with inventory management to ensure accurate stock tracking, and offering customization options tailored to the store's specific needs. By leveraging a POS system, Geeland International Grocery can streamline checkout processes, enhance customer satisfaction, optimize inventory management, and improve overall operational efficiency, ultimately driving business growth

Main Features:
- Product scanning and barcode support for quick checkout.
- Multiple payment options, including cash, credit/debit cards, and mobile payments.
- Integration with inventory management to update stock levels in real-time.
- Customer management features for loyalty programs and customer profiles.

Process and Capability Alignment:

- This aligns with Geeland's need to streamline the sales process from product selection to payment.
- Enhancing customer experience through quick and efficient transactions.
- Provides Support to inventory management by updating stock levels and product information.

Data → Information → Decision Flow:

Data: Product details, transaction information, customer profiles.
Information: Sales reports, inventory updates, customer purchase history.
Decision: Restocking decisions, sales performance analysis, and customer relationship management strategies.

2. **Customer Relationship Management (CRM) Module:**
   Geeland International Grocery currently lacks a structured approach to managing customer relationships and maximizing customer satisfaction, which hinders its ability to foster loyalty and drive repeat business. Without a dedicated Customer Relationship Management (CRM) system in place, the store encounters several challenges: limited customer data management, disconnected sales and marketing channels, manual lead management, and a lack of insights into customer engagement. Implementing a CRM system addresses these shortcomings by providing robust capabilities for managing customer data, integrating sales and marketing channels, automating sales processes, and offering reporting and analytics tools. With a CRM system in place, Geeland International Grocery can gain a deeper understanding of its customers, deliver personalized experiences, implement targeted marketing campaigns, streamline sales workflows, and make data-driven decisions to optimize its sales and marketing strategies for improved customer satisfaction and business growth

   Main Features:

   - Centralized customer database with contact information, purchase history, and communication logs.
   - Lead and opportunity management for tracking sales prospects and nurturing relationships.
   - Email integration for sending personalized communications and marketing campaigns.
   - Reporting and analytics dashboard to monitor sales performance and customer engagement.

   Process and Capability Alignment:

   - Improving customer engagement and retention through personalized interactions.
   - Supporting the sales process by identifying and prioritizing leads and opportunities.
   - Enabling data-driven decision-making through insights into customer behavior and preferences.

   Data → Information → Decision Flow:

Data: Customer profiles, communication history, lead status.
Information: Sales pipeline reports, customer engagement metrics, lead conversion rates.
Decision: Targeted marketing campaigns, sales strategy adjustments, and customer segmentation.

3. **Sales Analysis & Reporting Module:**

Geeland International Grocery currently lacks comprehensive insights into its sales performance, hindering its ability to make informed decisions and optimize its operations. Without a dedicated Sales Analysis & Reporting module, the store struggles to track sales trends, analyze performance metrics, and identify areas for improvement. Implementing a sales analysis and reporting module addresses these shortcomings by providing robust reporting and analytics capabilities, customization options for tailored reports, integration with sales and CRM modules, and real-time data visualization tools. With these features, Geeland International Grocery can gain valuable insights into its revenue streams, product performance, and customer preferences, enabling more informed decision-making and strategic planning. By leveraging the Sales Analysis & Reporting module, the store can effectively monitor its sales performance, identify opportunities for optimization, and drive business growth and profitability in a competitive market landscape.

Main Features:
- Pre-built and customizable sales reports, including sales by product, customer, and region.
- Dashboards with visual representations of key sales metrics and KPIs.
- Drill-down capabilities for detailed analysis of sales performance trends.
- Forecasting tools for predicting future sales based on historical data.

Process and Capability Alignment:
- Providing insights into sales performance and trends for informed decision-making.
- Identifying opportunities for sales growth and optimization.
- Supporting strategic planning and resource allocation based on sales forecasts and trends.

Data → Information → Decision Flow:
Data: Sales transactions, customer data, product information.
Information: Sales reports, trend analysis, forecasting models.
Decision: Sales strategy adjustments, inventory management decisions, resource allocation planning.

4. **Invoicing & Payment Module:**

Geeland International Grocery currently faces challenges in its invoicing and payment processes, lacking efficient tools to streamline billing and manage payments effectively. Without a dedicated Invoicing & Payment module, the store encounters manual and time-consuming tasks, leading to delayed payments and cash flow management issues. Implementing an invoicing and payment module addresses these issues by providing automated invoicing and payment processing capabilities, integration with sales and accounting modules, customization options for invoice templates and payment terms, and payment tracking and reconciliation features. By leveraging these functionalities, the store can improve operational efficiency, ensure timely payment collection, maintain accurate financial records, and enhance overall financial management. This not only simplifies billing processes but also strengthens cash flow management, ultimately contributing to the store's growth and success in a competitive market environment.

Main Features:
- Automatic generation of invoices based on sales orders.
- Tracking of payment status and recording of payments received.
- Sending invoices to customers via email directly from the system.
- Integration with accounting software for streamlined financial management.

Process and Capability Alignment:
- Streamlining the invoicing and payment process to improve cash flow and reduce administrative burden.

- Ensuring accurate and timely invoicing and payment recording for financial transparency.
- Supporting customer satisfaction by providing convenient payment options and timely invoicing.

Data → Information → Decision Flow:
Data: Sales orders, customer information, payment records.
Information: Invoice status, payment tracking, cash flow reports.
Decision: Cash flow management strategies, credit control measures, and financial planning adjustments.