

CASE: IT Assessment

Case Study:

Firmware/Hardware Manufacturing and Distribution

Accomplishments

- Assess the current list of planned IT projects and their alignment with business goals and strategies.
- Document the current IT systems, interactions, and integration points.
- Perform an assessment of data and system security and provide recommended changes.
- Select and manage a 3rd party audit of the network and system security. Incorporate findings and solutions on the IT Roadmap, as appropriate.
- Perform an assessment of the current IT roadmap and make recommendations to best accommodate growth.



Company Profile

This company designs, engineers, and produces high-volume, low-cost hardware devices with a software component that is highly configurable and customizable. Their proprietary firmware gives them a distinct advantage over their competition allowing them to meet diverse customer requirements. Based in the USA, they service Canada, Latin America, and the United States.

Hardware products are manufactured overseas and are shipped either direct to the customer or to inventory via over-the-water container transit. A 3rd party global logistics company is used for in-bound and out-bound freight services, inventory/warehouse management, work orders, product configuration, final prep (EPROM burn), kitting, and shipping product to customers. In addition, it uses a 3rd party data transfer tool to communicate sales and product data between the company and the 3PL.

Many of its systems are Software as a Service (Salesforce and supplemental products) for sales, order fulfillment, asset tracking, inventory, and customer service. The internally hosted systems are supporting product development, finance/accounting, file storage, and network security. Finance and accounting is currently based on multiuser QuickBooks.

The Client Challenge

The IT systems supporting sales, engineering, operations, and logistics evolved through the integration of various eclectic applications. With a distributed workforce across two major sites, remote home offices, contract manufacturing in Asia, outsourced final prep and logistics in Portland Oregon, and a rapid growth in sales, it is no surprise that comprehensive

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documentation and understanding of these systems was lacking.

The staff member responsible for maintaining stable operation of the systems was transitioning quickly to a new role in the organization that was expected to generate additional and significant revenue for the company. As the chief architect for the IT systems, he was the primary—and perhaps sole—source of truth for how the systems integrate and translate data between business processes. One of the more critical processes was order configuration and fulfillment.

Documenting that knowledge in high-level flow diagrams, architectural schematics, and process documents that explain how the system works was an urgent need

With the current and projected revenue growth (five- to ten-fold), the volume of shipments and the end-user installed base would increase substantially. Without a clear understanding of the current mash-up of systems, it was unclear whether they support the growth and volume of shipments projected over the next 18-24 months. It was suspected that they would struggle.

Process

eCameron consultants conducted a series of interviews, white-board sessions, and strategy sessions with the client's key staff members, executives, vendors, and managers.

Detailed discussions and reviews of observations and findings were conducted in the course of the engagement.

Vendor and reference calls and visits were conducted in the course of exploring potential ERP solutions.

Specific deliverables included:

- Current Systems Executive Summary, including key processes and high-level flow diagrams, gaps, and risks with recommendations.
- Risk matrix, including likelihood vs. impact, observation, impact and mitigation recommendations.
- Inventory of all systems and services, including owner, key data and integration flow, and annual cost.
- Invoice transaction analysis for all 2013 invoices and expenses.
- Data Access and Security Executive Summary, including gaps and mitigation/remediation actions. Recommended changes to Salesforce user profiles were included in the analysis.
- RFP, vendor selection, and audit coordination for 3rd party audit of network and systems.
- IT Assessment and Roadmap Executive summaries, including a detailed IT assessment covering strategy, people, process, financial, risk management, and technology.

For More Information

To explore the options for an IT Assessment at your company, call or email Savannah Rogers:

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