



Implementation Methodologies for SMEs

Phillip Zeelig, Business Analyst Manager



Topics for Today's Presentation

- 1 Introduction
- 2 Implementation Methodology
- 3 Quickstart & SaaS
- 4 Business Cases
- 5 Closing Statement

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Introduction

Who am I?



Introduction - About me



Phillip Zeelig - Business Analyst for Odoo, Inc.

 : @PhillipZeelig

 : <https://www.linkedin.com/pub/phillip-zeelig/35/a67/a93>

Education:

Masters in Business Administration from - California State University Monterey Bay
B.A. Degree in Economics - San Jose State University

Experience:

5 years professional experience in Project Management and Finance.

Velocity
Volume
Value

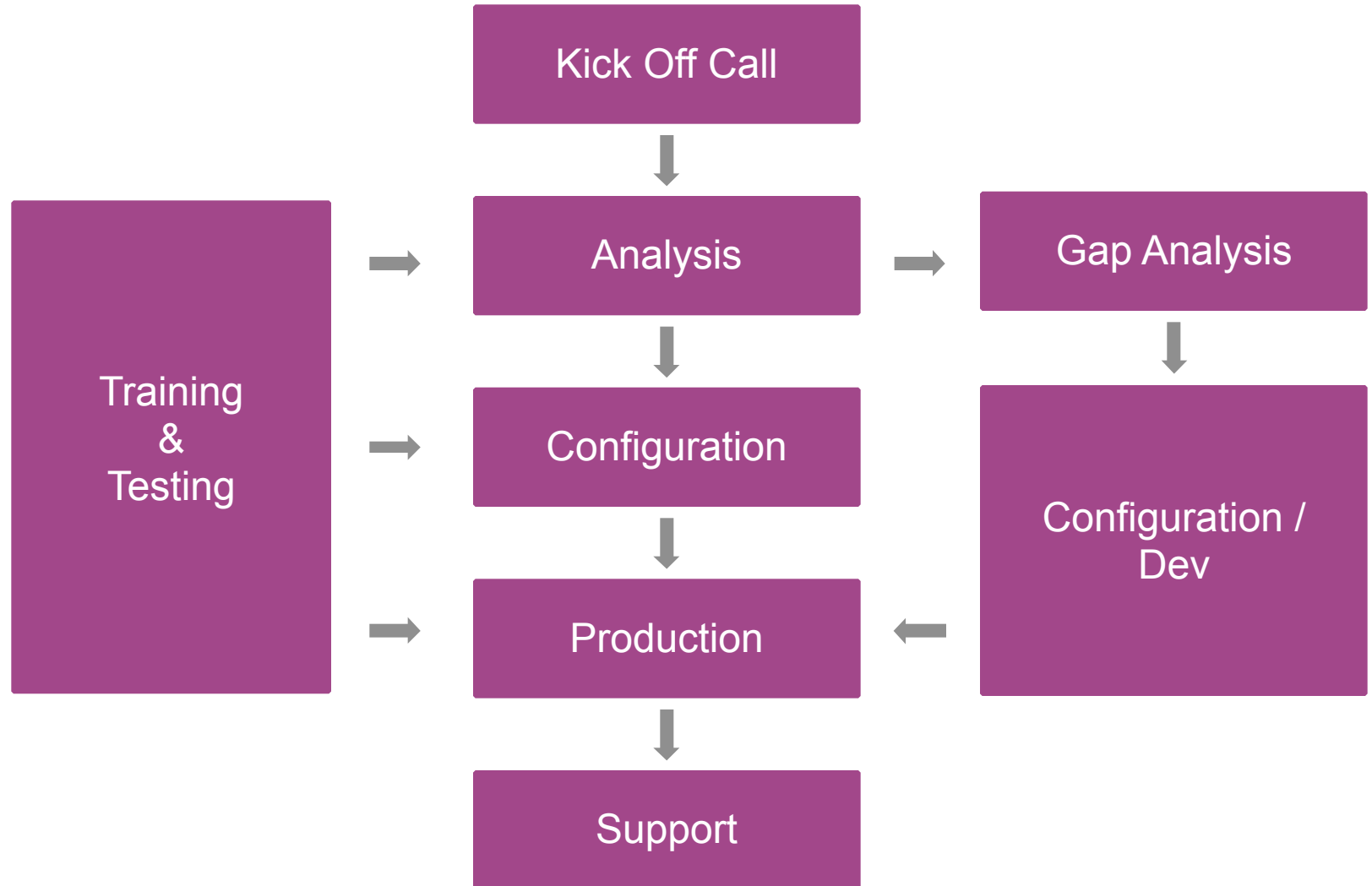
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Methodology

Implementation Methodologies
for SMEs



U.S. Implementation Process





Kick Off Call

Analysis

Configuration

Production

Support

Kick Off Call (Value)

- Set expectations (Quickstart Guide)
 - a. What is Quickstart?
 - b. Make sure that the customer understands the service you are providing, what is included and not included in their contract
 - c. How we work (process, weekly calls, we work with only one POC, etc.)
- Explain that you are training the client to be autonomous so that they will not need you in the further (scalable).
- Define the finish line (Business Analysts vs. Support Team).



Kick Off Call

Analysis

Configuration

Production

Support

Phasing the Project (Velocity + Volume)

- The customer does not need to install all the applications at once, they can start implementation one application at a time.
 - a. Start with standard applications that are easy to implement (CRM Sales)
 - b. Applications that the customer can use right away (Notes)



Kick Off Call

Analysis

Configuration

Production

Support

Gap Analysis (Value + Velocity)

For larger deals we include:

- o Spreadsheet communicating the needs of the client.
 1. Define: What are the needs covered using standard features
 2. What features need be developed / customized
 3. Estimation of the development
- o Statement of Work / Literature
 1. About the company - <https://www.odoo.com/page/about-us>
 2. Odoo Security - <https://www.odoo.com/page/security>



Kick Off Call

Analysis

Configuration

Production

Support

On-Boarding (Velocity + Volume + Value)

- What do I need to do to get this customer in production?
 - o Weekly sessions with the customers (Data, training workflows, basic access rights). Teach the customer!
 - o Customer drives 80% of the meeting with you giving instruction.
 - o The Goal is that the customer becomes as functionally sound as you are (as appropriate for their business).
 - o Never ask the customer do you need this, the answer will always be, "Yes"!



Kick Off Call

Analysis

Configuration

Production

Support

Deploying on SaaS (Velocity + Volume + Value)

- No need for hardware
 - a. No servers
 - b. No Reverse Proxy
 - c. Web Server
 - d. SSL certificates
- 99% uptime
- Security
- New Features / Apps (authorize.net for US)
- Bug Fixes
- Migration
 - a. Customer may request to stay on a version



The diagram is a horizontal sequence of five chevron-shaped boxes pointing to the right. The boxes are labeled 'Kick Off Call', 'Analysis', 'Configuration', 'Production', and 'Support'. The 'Production' box is highlighted in purple, while the others are white with a grey border.

Kick Off Call

Analysis

Configuration

Production

Support

A lot of apps in production quickly!

Velocity, Volume, and Value



The diagram illustrates the project lifecycle as a horizontal sequence of five chevron-shaped boxes. The first four boxes are white with grey borders and contain the text 'Kick Off Call', 'Analysis', 'Configuration', and 'Production' respectively. The fifth box is solid purple and contains the text 'Support'. Arrows are visible between the first four boxes, indicating a sequential flow.

Kick Off Call

Analysis

Configuration

Production

Support

Consulting Report / KPIs

We measure Analyst's performance using a few metrics below:

- Number of applications in Production
- Number of projects entirely in production and handed off to support
- Up selling (Monthly Recurring, Annually Recurring, Fixed)
- Subscription renewals after 1 year.

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Quickstart & SaaS

Misconceptions of QS and
Odoo's SaaS

Misconceptions

- It is difficult to convince / sell Quickstart to customers
- Everyone is different and needs custom development
- Quickstart projects are not profitable
- Customer will always want customizations
- You cannot customize / develop on the SaaS

Actualities

It is difficult to convince / sell quickstart to customers

- A. Faster Implementation Time (VELOCITY)
- B. Less Bugs (VALUE)
- C. Little to no migration problems (VALUE)
- D. Lower cost / better return on investment (on-time and under budget) (VALUE + VELOCITY)

Actualities

Everyone is different and needs custom development

Most companies are open to changing business processes and complex business processes should anyways be simplified.

1. Example Business Case: Fabrics Customer
2. Price lists – No logic to the price list. Based on price level and an algorithm no one knows / understands on an ancient spreadsheet.

Customizations add time and open the doors to develop the customer's wish list.

Actualities

Quickstart projects do not make money

- A. Quickstart projects during their life cycle are more profitable.
Faster to deploy (As little as one hour)
- B. Less bugs / support needed
- C. More probability that the project will be successful
- D. More projects delivered in a year means more recurring revenues, more enterprise renewals.

The customer always moves towards some customization

- A. It is your job to qualify the needs. Not all the needs of the customer justify development.
- B. Your customers are not Odoo gurus, but you are. So be creative & think out-of-the-box (standard) first.

Actualities

You cannot create customizations on the Odoo SaaS - YES YOU CAN!

The following ensure that you will keep your customizations:

A. Custom Views

- i. Always use inheritance
- ii. Custom fields
- iii. Custom Objects
 - 1. First field is always x_name

B. QWEB

- i. Non-updatable true

D. Server actions / Automated Actions

- i. Try to reuse existing methods in your code
- ii. Do not recreate the wheel
 - 1. ex. Unit of measure conversion

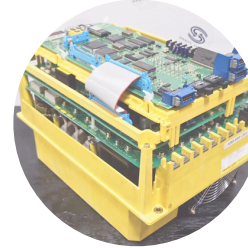
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Business Cases

San Francisco Progress



Frédéric Gilson



Manufacturing Company without Manufacturing Orders

A customer was interested in MRP with RMA. Their process was difficult to manage through the traditional and obvious features. The customer provides a service that includes the removal and replacement of parts within a servo motor or robot. This basic repair is always the same and the customer wants to reduce the inventory of parts when they sell a basic repair.

High Level Business Process:

Customer sends the motor to the company for a Basic Repair service. Once received it goes to a station to be disassembled and serviced. After the repair it is shipped back to the customer

Kick Off Call

Analysis

Configuration

Production

Support

Import Master
Product
Catalogue

Receipts



Sales



Invoice



Warehouse



Repair
Operation



Delivery
Operation



Business Cases in San Francisco

Create
Product / BOM

Standard Approach

Customer Sells a Basic Repair Service. This is actually a product that has a BOM and BOM type is “Set”. This is the product used on the SO.

Product	A06B-6089-H105 Basic Repair Service				Reference				
Product Variant					BoM Type	Set			
Quantity	1.000				When processing a sales order for this product, the delivery order will contain the raw materials, instead of the finished product.				
Components		Properties							
	Product	BoM Line Type	Product Quantity	Product Rounding	Manufacturing Efficiency	Valid From	Valid Until	Variants	Properties
	A06B-6089-H105	Normal	1.000	0.00	1.00				
	Rubber Seal	Normal	4.000	0.00	1.00				
	Ball Bearing	Normal	2.000	0.00	1.00				
	1/2" Stainless Steel Screws	Normal	10.000	0.00	1.00				
	[X124] 1/8" Round Rubber Hose 10"	Normal	1.000	0.00	1.00				

Kick Off Call

Analysis

Configuration

Production

Support

Import Master
Product
Catalogue

Receipts



Sales



Invoice



Warehouse



Repair
Operation



Delivery
Operation


Standard Approach

The customer receives and incoming shipment for the motor to service (WH\IN\00001). Then they bill for the repair.

Receipts

Sales

WH\IN\00001



Partner

Customer Repair

Creation Date

06/02/2015 07:26:17

Scheduled Date

06/02/2015 07:26:22

Customer

Motor Company

Date

06/02/2015 06:22:13

Reference/Description

Warehouse

Motor Repair Company

Products

Add

Product

A06B-6089-H105

Order Lines

Other Information

Product	Description	Quantity	Unit Price	Taxes	Subtotal
A06B-6089-H105 Basic Repair Service	A06B-6089-H105 Basic Repair Service: Includes the replacement of screws, bearings, seals, and hoses	1.000	2500.00		2500.00

Untaxed Amount :

\$ 2500.00

Taxes :

\$ 0.00

Total :

\$ 2500.00

Standard Approach

Using advanced routes the sales order triggers two operations, the REPAIR and the DELIVERY.

Delivery

Repair
Operation

WH\DLV\00001

Partner	Motor Company	Creation Date	06/02/2015 07:15:33
		Scheduled Date	06/09/2015 07:15:10
		Source Document	SO001

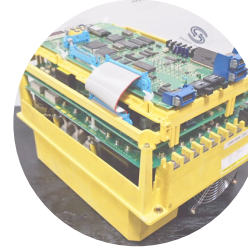
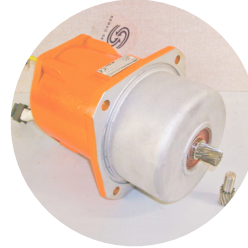
WH\REPAIR\00001

Products	Partner	Motor Company	Creation Date	06/02/2015 07:15:58
Product			Scheduled Date	06/09/2015 07:15:10
A06B-608			Source Document	SO001:WH: Output -> Customers
Rubber Se				
Ball Bearir				
1/2" Stain				
[X124] 1/				

Products	Additional Info
Product	
Quantity	
Destination Location	
Availability	
Status	
A06B-6089-H105	1.000 🚚 WH/Output 0.0 Waiting Availability
Rubber Seal	4.000 🚚 WH/Output 0.0 Waiting Availability
Ball Bearing	2.000 🚚 WH/Output 0.0 Waiting Availability
1/2" Stainless Steel Screws	10.000 🚚 WH/Output 0.0 Waiting Availability
[X124] 1/8" Round Rubber Hose 10"	1.000 🚚 WH/Output 0.0 Waiting Availability



Frédéric Gilson



Manufacturing Company without Manufacturing Orders

1. No need to develop to accommodate for additional parts to be used during the repair i.e. dynamic BOM based on sales order lines. (Velocity + Value)
2. No need to train the customer how to use a MO just how to create a BOM (Velocity + Volume)



Piyasa Banerjee



Customer has hundreds of employees and needs a system for managers to manage HR Forms.

Customer was sold customization for HR and Sales, Analyst reevaluated and decided to use remove customized sales and standard Marketing. The customer is now able to create all the forms by themselves (as many as they want in the form of surveys) without adding fields, views, custom reports. Therefore, the customer is now autonomous and can create and edit new forms as needed without the help of a consultant.

Adding value, increasing velocity, and increasing the volume of apps in production.

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Conclusion

Closing Statements

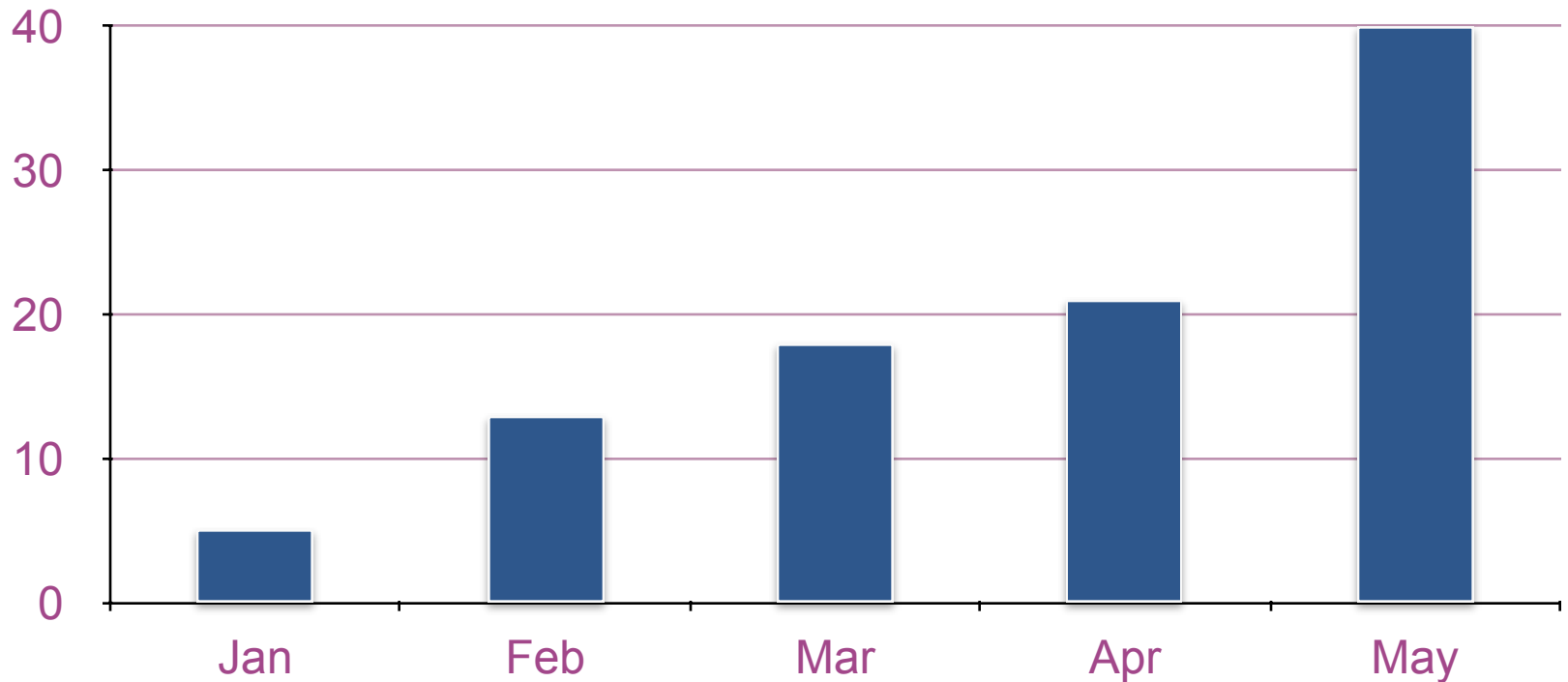




Business Cases in San Francisco

Progress in San Francisco

New Applications in Production (monthly)





Conclusion

The Quickstart methodology works and it shows in the rate we are able to implement in San Francisco. In the US and LATAM, there are partners that are starting to move towards SaaS implementations. We have 4 quickstart projects through partners this year.

Focus on:

Velocity - Improving the rate that you deploy and implement projects by narrowing the scope, phasing the project, limiting customizations and developments, and deploying on SaaS.

Volume - Try to increase the number of users and apps in production rather than developing custom business specific modules.

Value - Increase value proposition by offering SaaS, helping the customer be more efficient by simplifying their business process, be creative, deploy fast and under budget.

Tip's and tricks:

Create server actions and views that you can reuse. Therefore, avoid making business specific developments. This will increase your velocity as you can copy and paste them into new databases.

Create a repository for all your Qweb / custom reports (again copy and paste)

Try not to create server actions to bring in information onto a form view. It is much easier to have the information show on a report.

`(o.sale_id.x_field_id.name)`



Thank You!