



CP-90 Costpoint Wellness 101

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Agenda Slide

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- What is a Wellness Assessment?
- What are the symptoms?
- Who can benefit?
- How is it conducted?
- What is included?
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- What can I expect from deploying the plan?
- When is the best time?
- Q&A



Introduction

- Lexell Blue, LLC headquartered in Northern Virginia
- Comprised of four partners and a team of consultants with extensive experience with the Deltek GovCon suite of products
- Costpoint consulting services
 - CP / TESS Implementations including Project Manufacturing
 - Data Migration and Restructures
 - M&A Integration and Divestitures
 - Costpoint Health Check
 - Costpoint Training
 - Cognos Report Development
 - Extensibility & Interfaces

Introduction

Susan Pucciano

- Title: Partner, Lexell Blue
- Experience:
 - 22 years at Deltek
 - Over 29 years of Costpoint / GovCon experience
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Paul Whiteman

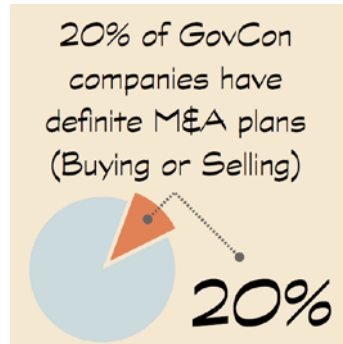
- Title: Partner, Lexell Blue
- Experience:
 - 10 years at Deltek
 - Over 16 years of Costpoint / GovCon experience
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What Is a Wellness Assessment?

- Comprehensive review and analysis of the firm's business processes and how they align with Costpoint functionality
- Includes a technical review of the infrastructure supporting it and related stability and performance issues
- Identify, understand, prioritize and create a plan to address existing pain points impacting end users, system administrators, and other stakeholders
- Document actionable opportunities for improvement related to the utilization of current functionality within system and expected near and long term outcomes

What are the Symptoms?

- Costpoint has been deployed for a number of years and may not fit today's needs
- Acquisitions have occurred and there wasn't time to design for their inclusion
- High turnover has led to inconsistent processes
- Inherited processes have become a "we have always done it that way" approach
- Process bottlenecks
- Manual processes
- Reorganizations have occurred without accounting for the impact to configuration
- Disparate / redundant / offline systems
- Multiple database instances without a configuration management plan
- Degraded system performance



Who Can Benefit?

Process	Process optimization
Billing	<ul style="list-style-type: none">• Offline billing calculation• Manual offline formatting
Indirect Rates	<ul style="list-style-type: none">• Offline calculation of service centers• Manual data entry of indirect cost information
Revenue	<ul style="list-style-type: none">• Multiple sources for revenue calculation (offline spreadsheets)
Accounts Payable	<ul style="list-style-type: none">• Multiple balance sheet entities combined into one A/P (lack of smart logic and exception reporting)
General Ledger	<ul style="list-style-type: none">• Are journal entries the cure for all your ills?
Fixed Assets	<ul style="list-style-type: none">• Disparate system
Procurement	<ul style="list-style-type: none">• Paper requisitions• Disparate procurement system

Who Can Benefit?

Process	Process optimization
Manufacturing	<ul style="list-style-type: none">• Manual and/or offline Manufacturing Planning• Uncontrolled Part/BOM maintenance
Report Developer	<ul style="list-style-type: none">• Align the data to facilitate the analysis based on today's requirements versus yesterday's process of slicing and dicing
Report Consumer	<ul style="list-style-type: none">• Streamlined process to efficiently access the data more frequently
IT	<ul style="list-style-type: none">• Storage space• Hardware• Potentially 3rd party licenses
O&M	<ul style="list-style-type: none">• Knowledge transfer on non-deployed functionality• Reducing manual / redundant systems will optimize day to day support

How Is It Conducted?



What Is Included In the User & Data Review?

- Review of user roles and rights (user security)
- SOD in 7
- Data Review
 - Stale records
 - Open Billing Detail
 - Open POs
 - Merging duplicative data
 - PAGs
 - PLCs
 - Leveraging smart logic
 - Identifying data by entity

What Is Included In the Technical Review?

- Technical review
 - Number of databases and purposes
 - Infrastructure review of existing Deltek servers (Database, Costpoint App, T&E etc.)
 - Partitioning or reorganizing of Deltek tables
 - Process to apply hot fixes / patches
 - Process management and use of job server
 - Purging and archiving strategy



What Is Included In the Functional Review?

- Functional process review
 - Is your current structure working for you (ex. Accounts/Orgs/Projects)
 - Workflow process for Project Setup
 - Labor, Leave, Time & Expense
 - Billing process
 - Revenue recognition process

What Is Included In the Functional Review?

- Functional process review
 - Pools
 - Leveraging IWOs
 - Procure to pay process
 - Manufacturing process
 - Licensed modules – what aren't you leveraging

What is Included in the Reporting Review?

Report Sources

- Production
- Data warehouse

How reports are received

- Bursting
- Manually Run
- Dashboard drill-through

Other

- Report Security
- Use of exception reporting

What Is Included In the Offline Process and Integration Review?

- Review of offline processes (manual, etc)
 - Excel spreadsheets / Access Databases
 - Billing
 - Fixed Assets
 - Budgets
 - Requisitions / Purchase Orders
 - Service Centers
- Analyze for opportunities to leverage
 - Extensibility
 - Web services for the automation of inbound and outbound data for integration to other systems



What Is Included In the Training Review?

- Identify training needs
 - Training new users
 - Training existing users
 - New functionality
 - Under-utilized functionality
- Ongoing training
 - Leveraging a training database
 - Process to update desktop procedures / guides
 - Breaking the “we have always done it that way” pattern

Leveraging the Findings

- Review and understand the findings
- Agree on prioritization of the recommendations to be deployed
- Leverage quick wins with low hanging fruit
- Develop a roadmap of the phased deployment plan (don't boil the ocean)
- Develop communication plan including change management impacts
- Have an internal champion to make sure the report doesn't just end up on the shelf



Deploy the Plan

- The expected results of the deployment of the recommendations
 - Enhance usage and streamline functions through business process changes
 - Improve configuration of the system
 - Leverage new functionality (e.g. extensibility, web services)
 - Improve performance



Materials/Manufacturing Assessments

- Kickoff meeting with business function managers/leads
 - Manufacturing Business Model
 - Product Lines
 - High level process review
- Factory/Facility tour





Materials/Manufacturing Assessments

- Workshops with individual business functions (typically follows end-to-end process)
 - Contracts/Sales Orders
 - Finance/Cost Accounting
 - Configuration Management
 - Manufacturing Engineering
 - Production Planning
 - Production Control
 - Procurement
 - Inventory / Shipping / Receiving
 - Quality
- Interviews include SME's and end users

Materials/Manufacturing Recommendations

Recommendation: Implement Sales Orders for generating inventory reservations and therefore MRP demand for all customer orders, including production orders.

- Issue: Currently only simple Sales Orders are entered using Intransit orders.

Recommendation: Utilize the Document master in Costpoint to represent the Drawing Revision.

- Issue: Currently the Item Revision in Costpoint correlates to the drawing revision in Solidworks. So for any drawing revision change, in which there is no change to the product, the revision of the part needs to be updated also. This creates a lot of unnecessary overhead related to

Recommendation: Use Alternate Parts for tracking Manufacturer and Vendor part numbers.

- Issue: Currently any reference to an external Manufacturer/Vendor part number is recorded in PO's.

Recommendation: Limit security access for creating Costpoint parts to only Configuration Management.

- Issue: Currently many users in various roles have access to create and maintain parts. As a result there are many parts that are not needed. There is a risk that critical part information may not

Recommendation: Move to MRP planning for all Make and Buy requirements

- Issue: Currently PMR is used in a limited capacity to assist in make and buy part material planning. The major limitation with PMR is that you need to identify specific finished product part numbers to plan against, and each PMR analysis does not take into consideration lower level planned orders for other product and project demand.

When is the best time?

There is no perfect time . . .but..

When is the best time?

WHAT IF!

(Mike Rayburn)

Remember to visit
the mobile app and
complete the
session survey. >

Your feedback is greatly appreciated!



Come Visit Our Booth and Introduce Yourself



Questions?

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See our Costpoint Health Check Video

<https://youtu.be/q3qcSkMDZHE>