Implementing Plex Online:
Pilot Part Methodology and Just-in-Time Training

At a Glance

- This paper describes the Plex Online implementation and training process, a process perfected over hundreds of successes.

- Plex Online's four–phase training takes place in stages: piloting, testing, systems enhancements, and go–live.

- Targeted, efficient just–in–time training drives 98 percent customer satisfaction in Plex Online implementations — 32 percent better than industry average.

Freed from the Chains of Typical Implementations

A quick search online of "systems implementations" brings up a multitude of articles and white papers containing descriptions of past implementations, using words such as "horror," cringe," "nightmare." The list goes on.

What if your next system implementation didn't have to be like that? What if it could be done in less than half the time of typical implementations and with the vast majority of employees remaining on the job during training and implementation? What if your business and your employees never had to go through another software version upgrade and its related training again? What if your business could carry on as usual, without interruptions, during implementation?

That's what an implementation of Plex Online is like.

More than 98 percent of Plex Online customers report satisfaction with their implementation of Plex Online. When you compare those results with only 66 percent of satisfied customers, as noted in The Chaos Report, the effectiveness of Plex Online's implementation process is clear.

Before understanding how to implement Plex Online in your company's environment, it's important to comprehend how different this system is from any other you may have implemented before.

The best way to understand how it is different from traditional client–server software is to highlight what Plex Online is not.

> "More than 98 percent of Plex Online customers report satisfaction with their implementations vs. a 66 percent industry average."

What Plex Online Is Not

Plex Online:

- Is not static.

- Does not come packaged in a CD that you download onto your system.

- Does not run off of a rack of servers at your site.

- Does not require a busload of consultants to customize the software for your business or rework your business to match the software.

- Will not require your staff to be locked in conference rooms for lengthy training sessions.

- Will never need updating or new version updates.

On-Demand, SaaS Model

Plex Online is an on-demand Software as a Service (SaaS) system. This means you access the software using a Web browser over the Internet from anywhere at any time. That's the "on-demand" part. Plex Systems is constantly improving and updating its software; upgrades and new features are added continuously.

Because Plex Online is set up this way— with only one instance of the software running and supporting many users— it can be constantly updated and changes can be made available automatically to everyone. Much like users of Google or EBay, all customers use the same, single version of the software, which has technology to guarantee privacy and security. The sharing of hardware, infrastructure and software reduces complexity, simplifies maintenance, lowers costs, and enables upgrades to be developed and implemented rapidly.

On the hardware side, Plex Systems provides servers, operating systems, database, backup equipment, and complex programming resources and environment. This allows you to focus on running your business rather than focus on running computers.

Data Entry Ease

Data entry is one of customers' main concerns as they contemplate implementation. Their first question is whether data must be manually entered. The answer is "yes," for several reasons. First, the code for Plex Online was written directly to the Web and is consequently very different from traditional applications. Also, because the system is flexible, customers can rename and number parts in a way that is more intuitive for humans and not a blur of alphanumeric characters that look like computer code. Now it is possible to use an industry-standard lexicon to enter raw materials and parts.

Not all data must be entered manually, however. Many upload programs are already built into Plex Online. Plex Systems will help you identify and execute a data entry strategy that best meets your needs.

Phased Training

Typically when companies implement new computer systems, the process can be lengthy and work-intensive. It requires extra, non-productive staff hours of training. Not so with Plex Online.

Implementation starts with a kick-off meeting, attended by Plex Systems experts and your team. At the kick-off meeting, training priorities are determined and key objectives are defined. While Plex Systems provides the structure for these meetings, your team drives the agenda and determines the training and implementation

priorities. Also during the kick-off, the team defines the tasks and data required for each function and identifies the criteria for determining the attendees for each function. Once these decisions are made, the four-phase implementation begins.

Implementation Phase One: Conference Room Pilot
Estimated time required: three weeks of two 1.5-hour meetings per week

At this stage, your implementation team of process leaders and at least one representative from each function works with Plex Systems' implementation team to enter one component or part into the system. The group members move this part through the system, defining what they believe are the optimum processes for handling. The goal at this stage is to determine the optimum processes.

It is noteworthy that only one part is entered at this stage, and the implementation team will continue to work only with this one part until well into implementation. This allows for testing and changes to be made to the software and the process. If more than one part is entered at this stage, changes would have to be made on all of the parts entered. Focusing on just one part avoids that rework.

> "Plex Online allows you to focus on running your business rather than focus on running computers."

Conference Room Pilot meetings are short, no more than two hours each. Then team members take their learning back to their jobs, discuss the software features and processes with their colleagues and get input from staff, customers and suppliers on how to best use the system.

Team members are asked at each subsequent meeting to share what they have learned from discussions with coworkers and suppliers, and what new ideas they have based on their experiences with the system. Software and processes are adjusted accordingly.

Once the implementation team members are satisfied that they have the optimum system, it is time to start real-world implementation.

Implementation Phase Two: One-Part Parallel
Estimated time required: two weeks

Continuing to use only one part, the implementation team begins to test the software and processes in the production environment. The goal now is to test and validate the processes and get input on the software features from staff, customers and suppliers. Adaptations to the processes and software are then made and continue to be tested.

The rest of the operation continues running on the company's legacy system, keeping rework to a minimum. In addition, at this time recommendations are made regarding hardware that will add efficiency and facilitate smooth operations, such as barcode scanners, touch-screen computers, printers, etc.

Implementation Phase Three: Multi-Part Parallel
Estimated time required: two weeks

Once processes have been validated and software changes are being fine-tuned, more parts are added to the system and hardware installation begins. Testing and validation of software and business processes continues. Departments continue training and employees begin inputting data on their functions and relevant screens. They are encouraged to provide feedback on all aspects of the system; changes can still be made. Another focus at this stage is system optimization, making sure even "oddball" cases work in the system.

Implementation Phase Four: Go-Live
Estimated time required: two weeks

At this stage, all users are trained and able to access the system, the majority of the data has been entered, and hardware is in place and tested. Adjustments can be made to the system and everyone in the company can adjust to new tasks and processes.

A Partnership in Planning

Plex Systems' strong partnerships with its manufacturing clients are based on its ability to adapt to meet each company's needs. This starts during implementation.

Both your team and the Plex Systems team take full ownership of the implementation process. Your team brings a deep understanding of its industry and internal business processes, while the Plex Systems team members bring broad knowledge of best practices and a detailed knowledge of Plex Online.

The most successful and seamless implementations occur when the manufacturer is fully engaged in the process. Perhaps the most important thing your team members can provide is a consensus on how they see their end-state organization functioning. It is critical that your team clearly defines the "to be" processes that will work in concert with Plex Online once it is up and running.

Approach to Training

Plex Systems takes a just-in-time approach to training. Training takes place when employees are ready to start engaging daily with the system. For the core team, that is day one of the Conference Room Pilot phase, and for others in the organization that is during phases two and three.

Hundreds of implementations have taught Plex Systems that the best approach to training is to conduct short training sessions and then have employees return to work. This allows them time to try out what they have learned and develop ideas for process modifications and system optimization.

> "Plex Online adapts to meet each manufacturer's needs, and this starts during implementation."

Training starts in a meeting format then continues with employees at their workstations by teleconference and online. As employees begin to work with Plex Online, entering data, they become increasingly familiar with the software's features and benefits.

Online training sessions by teleconference allow for flexibility in scheduling and the ability to immediately access other Plex Online experts. This type of training is effective because the software itself is online— everyone can instantly see the results of transactions made from anywhere in the world.

Plex Systems' approach to training is less onerous and formal than what is typical for new system implementations. No one person can gain detailed knowledge of every aspect of the Plex Online system since it includes 350 functions. However, many team members can each develop extensive understandings of specific functions.

Many employees can perform their jobs using only two or three screens of their functions within Plex Online. Training is approached with this in mind. Employees learn overall system principles. Then they get right to work learning how to operate the system as they work with the implementation team to validate business processes.

About Plex Online

Plex Online, built on a "Software as a Service" (SaaS) model, offers more than 350 functional modules, providing manufacturers instant access to vital information and management functions using a simple Web browser. The on-demand solution features product lifecycle management (PLM) functions such as program and change management, enterprise resource planning (ERP) functions such as accounting and finance modules, customer relationship management (CRM) features such as order entry and tracking, manufacturing execution systems (MES) functions such as production scheduling and machine integration and supply chain management (SCM) functions such as supplier quality and traceability.

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