

ESOP

ENTERPRISE SYSTEMS AND OPERATING PROCESSES

"Setting the foundation for Grizzard's best future"

March Enterprise Systems & Operating Process (ESOP) Update



Chip Grizzard, Chief Executive Officer

“We are off to a great start with the ESOP project!!!!

March has been a very busy month, and April is keeping pace. We are so busy, in fact, that we are just catching our collective breath enough to get this note out to all Grizzard employees.

In an effort to keep everyone informed of the project’s status, we are committed to providing all employees with regular updates. In addition, please read about the new Communications Team below.

Here are a few project highlights...”

Leadership team meets in mid- March to review the ESOP project

We made a decision to manage Enterprise Resource Planning (ERP), Customer Relationship Management (CRM) and the required business process improvement effort as one project – ESOP (Enterprise Systems and Operating Processes). ERP is based on the Microsoft Dynamics Great Plains technology, and CRM is based on the Salesforce.com platform.

ESOP will allow us to manage our customers’ information, production data and billing processes from “end-to-end.” Successful completion of ESOP will allow us to retire older technology, address customer dissatisfaction and employee frustration, and improve our financial results. The ESOP project is the enabling technology and new business processes that “Sets the foundation for Grizzard’s Best Future.”

After reviewing the project charter, establishing a timeline, and documenting the risks and issues, **we reached consensus as a leadership team to support the successful completion of the ESOP project on time and within the established budget.**

We plan to meet again as a leadership team on a regular schedule between now and our October “go-live” date.

Salesforce.com & Great Plains Application:

From an operational perspective, our focus in March has been to deploy Salesforce.com to account teams and to design the Great Plains application.

SalesForce.com is being deployed to the account teams in two phases. In June, there will be an alignment of the SalesForce.com and Great Plains project timelines and all deployment activities will then be part of the ESOP project. Mark Litherland, CRM Project Manager, and Shannon Fitzgerald, SalesForce.com Administrator, have been working with account teams.

Here are some highlights:

- Phase 1 – Launched the Army and Animal Care teams
- Phase 2 – Training and Adoption for Missions and Healthcare teams

The ESOP project is now organized into teams: the Executive Steering Committee, the Business Readiness Team (BRT), the Project Management Team and the Communications Team.

New Project Manager Onboard

Preeti Puri joined Grizzard as our ESOP Project Manager in March. She joins us with a wealth of finance and implementation experience. She will transition to a new finance role after all phases of our project is implemented. I want to take a minute to thank Bruce Madison, who took on additional responsibilities as the ERP Project Manager. Bruce got the ERP project off to a great start Thanks, Bruce, for all your effort and time – I know you appreciate having Preeti on board.

Our goal is to make sure we are addressing all aspects of the project: strategy and guidance, project management, communications and training.

The Steering Committee members are Chip Grizzard, Bill Huber, Debbi Barber, Chris Joos, Mike Roberts from Activ Technologies and a representative from DAS. This team meets with Preeti Puri, Morten Jensen, Mike Abbagnaro and Stuart Smith early every Monday to review the project status, provide strategic direction and address larger organizational issues.

The Business Readiness Team (BRT) meets every

Thursday. The BRT is the “link” between the project and functional areas. *The BRT’s goal is to make sure all Grizzard employees are ready to work with their new systems and processes.* Current team members are Preeti Puri, Bruce Madison, Mark Litherland, Mike Abbagnaro, Brant McAdoo, Jody Adkison, Gina Rutkowski, Vicki Dauenhauer and Stuart Smith. In the near future, the team will be expanded to include sales and account team employees, production and procurement, and employees from other functional areas.

The Project Management Team meets every Wednesday. The Project Management Team manages the project plans for the ERP and CRM projects. Current team members are Preeti Puri, Mark Litherland, Carl Jones and Morten Jensen. The Project Team’s goal is to manage project changes and to make sure the day to day project items are making progress and getting completed on time.

The Communication Team is a newly-formed team. *This team’s goal is to ensure all employees to understand the project well enough to support it.* Douglas Broward, Carolyn Ford and Laura Voyles have volunteered to help communicate information about the project. Until now, we have only used e-mail and meetings to communicate project information. From now on, the communications team will help design more effective and creative ways to communicate to employees. So be on the lookout for communications in a variety of formats.

Continued...Salesforce.com & MDGP Application:

The Activ Technologies team has installed and configured the Great Plains test system and conducted numerous Joint Application Design (JAD) sessions. JAD is part of an accelerated implementation methodology in which the technology team and business or process owners work together to design the new application. Representatives from the Account teams, Production, Procurement, IT and Accounting have been involved in the JAD sessions. JAD sessions always start by training the process owners on the system’s capability. Once the training of process owners is completed, the JAD sessions follow with the initial design of how the system should work to support our future-state business practices. JAD sessions will continue throughout April.

Training and JAD sessions completed in March/April:

- Initial MDGP systems installation
- General Ledger
- Bank Reconciliation
- Accounts Receivables
- Purchasing
- Expense Reporting and Lockbox
- Collections
- Business Portal
- Inventory
- Fixed Assets
- Project Accounting

Though there is a wealth of information in this email, it is not inclusive of everything that has happened. It is almost impossible to recognize all the effort, time and hard work completed in March, and we are just beginning!

I want to encourage all employees to support this effort and get involved in the project whenever and wherever you are needed. As you do get involved, I am asking you to challenge our current business practices and to think about how things can and should be – not how we do things now. We cannot miss this opportunity to improve our business and meet our customers’ and employees’ expectations.

Thanks,

