

Step 1: Discovery

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This guide introduces the Discovery process and how aACE supports learning during implementation. It is intended for new users.

The aACE Discovery Process

aACE Software performs a needs assessment through a series of meetings called the Discovery process (Discovery). Discovery helps the aACEsoft team refine ideas by understanding real user problems, evaluating needs, and proposing solutions – essentially, Discovery is an exchange of knowledge. It proceeds in three overlapping phases: Training, Gap Analysis, and the Development Plan. We have worked with a long line of customers, each time learning more and refining these steps for successful implementations. Discovery leverages that experience to benefit your company:

- **We Learn About You** – The best way for us to learn about your business is through discussion and examples. We start by reviewing an initial sales opportunity, then moving through your sales cycle. Next, we jump into fulfillment, explore your processes, and finally land in billing. We learn the details of how you work, why you do what you do, and your expected results from each process or procedure. You can articulate deficiencies in your current processes and we will discuss ideas for improvement.
- **You Learn About aACE** – As we learn about your workflows, we show you examples of how you can use aACE to improve them. Together we walk through each process on-screen and discuss each step along the way. Then you will get hands-on with aACE by practicing in a sandbox version.
- **The Sandbox** – Your Discovery Team will have access to a hosted version of aACE, which we call a “sandbox.” Your team will have the opportunity to walk through the tasks demonstrated in the learning modules, use your own data, and practice real examples to identify any gaps. The team will envision daily work with aACE and discover new ways of making your workflows more efficient.



The 3 Phases of Discovery: Training, Gap Analysis, and Development Plan

During the training phase, your team will learn the capabilities of the software while your aACEsoft advisor learns your business requirements. This initial learning will shape subsequent conversations and meeting agendas. Training in aACE can be a self-guided process or your advisor can guide the team through each learning module. Your Discovery Team will be asked to practice what is learned in the training modules and/or meetings. Each meeting includes a Q & A, so the group can ask any questions that have surfaced as a result of their practice.

The “gap” in the Gap Analysis phase refers to the space between where you are (present state) and where you want to be (target state). In this phase, you and your aACEsoft advisor will review existing systems and workflows, compare each to the equivalent in aACE, and map out the way to your target state. This analysis documents aACE functionality that supports your workflows, the changes to improve your current workflows, and the configurations and customizations that may be required to bridge the gaps.

In the third phase, we evaluate notes from the Gap Analysis, discuss what is relevant, what has changed, and create a plan. This Development Plan will detail:

- Specific modifications that your advisor will make to aACE
- Prioritization of those modifications
- A cost estimate
- A timeline

The Development Plan helps set a cost estimate for the service component of an aACE implementation. (Please note that customization is only available with the Enterprise Edition.)

Training

All members of your Discovery Team become aACE super users. This means that even if a person's job is concerned with only one area of the business, they learn how other users interact with the system from start to finish.

It is vital to train a handful of super users who understand the full scope of your business operations and how the departments and roles relate. This group enables an implementation approach in which the aACE system can be rolled out incrementally to other users. Some information during Discovery might not be 'directly relevant' to a super user's role in your organization. But training a core team that has a systems view of your company workflows is critical for a successful implementation. These leaders will be trainers, change agents, and the first line of support during your go-live.

A successful ERP implementation involves much more than developing and testing software. Corporate change management, employee buy-in, and the involvement of senior management are also critical to a successful outcome.

aACE Foundational Training Topics and Sequence

aACE training is organized to help learners gradually understand the conventions of the software. Each lesson has been intentionally sequenced to build from the previous lesson. However, if any topics are not applicable to your company, they can be omitted.

Training new users on aACE begins with accounts payable and purchase orders. These processes tend to be common from company to company, and processing POs enters foundational inventory data into your system. We progress to simple sales orders, selling the items we 'purchased'. The learners are gradually introduced to more complex aspects of managing fulfillment. Inventory and accounting topics are both reserved for later lessons as data must be in the system before your team can work with these modules. Additional 'floating' topics can be inserted anywhere in the process.

The following guides provide more focused information about the standard training sequence your implementation team will cover:

- [Basics](https://aace6.knowledgeowl.com/help/discovery-training-basics) (https://aace6.knowledgeowl.com/help/discovery-training-basics)
- [Purchase Orders](https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders) (https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders)
- [Sales Orders](https://aace6.knowledgeowl.com/help/discovery-training-sales-orders) (https://aace6.knowledgeowl.com/help/discovery-training-sales-orders)
- [Production](https://aace6.knowledgeowl.com/help/discovery-training-production) (https://aace6.knowledgeowl.com/help/discovery-training-production)
- [Inventory](https://aace6.knowledgeowl.com/help/discovery-training-inventory) (https://aace6.knowledgeowl.com/help/discovery-training-inventory)
- [Accounting](https://aace6.knowledgeowl.com/help/discovery-training-accounting) (https://aace6.knowledgeowl.com/help/discovery-training-accounting)
- [System Administration](https://aace6.knowledgeowl.com/help/discovery-training-system-administration) (https://aace6.knowledgeowl.com/help/discovery-training-system-administration)

Discovery Meetings and Homework

During Discovery, you will meet with your aACEsoft advisor. Each meeting will be tailored to your needs. Your advisor will host the meetings to guide you through the demo system or, if you are doing the training as a self-guided process, the meetings can focus on answering questions. Each meeting is recorded and will be emailed to the Discovery Team and posted in your designated implementation project checklist.

The first meeting will be a kick-off for the project. All stakeholders should attend to establish clear expectations and ensure a successful implementation. During this meeting, your advisor will discuss initial planning, set tasks, and answer your team's questions.

Each meeting and/or training module concludes with a list of "homework" assignments for the Discovery Team to complete. Each team member should practice and replicate tasks that have been presented. Failure to complete this homework prior to the next meeting will extend the duration of this phase. *Participation from the team is essential to the success of the project; therefore, aACEsoft reserves the right to terminate the project if project leaders do not participate in this process to the degree required for a successful implementation.*

Getting Started in Discovery

An effective Discovery process requires hands-on work in a demo aACE system. aACE provides everything you need to set up the demo system, get logged in, and get started!

During your practice, the team will use data relevant to your company. aACE divides data into two categories:

- Master Data – This includes the records needed in order to conduct a business exchange (e.g. customer companies, vendors, products, team members, etc).
- Transaction Data – This includes the records for an actual business exchange (e.g. purchase orders, sales orders, shipments, etc).

aACE recommends that real information be entered for master data, but that test information be entered for transactions. For example, you would create a company record for a vendor that you actually order from. Then, you would create a purchase order that does not reflect an actual business exchange.

The Discovery Team will also practice creating several records of each kind. This practice cements understanding. After the team has created some records, additional records can be imported easily.

Practice data will eventually be cleared from your system. Transaction data is usually removed from the system during the Go-Live. Master data can be removed at go-live or can be left in the system, per your preference.

Gap Analysis

When choosing an ERP solution you have to determine whether you are willing to update your internal processes to take advantage of available functionality. Many organizations find that they have not updated processes in years, so this becomes a welcomed opportunity to review and improve business processes.

The goals of the Gap Analysis are to:

- Run your transactions through the system
- Review existing processes in the functional areas of the company
- Review the workflows and features available through different configurations of the software
- Train project leaders on applicable areas of the out-of-the-box (OOTB) version of aACE
- Note areas of desired customization where OOTB workflows are insufficient
- Develop concrete customization specifications for the Software Development Team
- Schedule customization in order of priority and logical precedence

During Discovery, your team will run transactions through the system. When team members find a gap, they will record it. Then compare the company's current processes to aACE functionality and discuss whether:

1. Current processes need to change
2. aACE needs to change
3. Some combination of these two

This analysis must start through the lens of the software. Not starting from the aACE perspective increases the chance of merely recreating existing workflows and not taking advantage of potential software efficiencies. This can jeopardize the success of the project and ultimately is not cost effective.

The analysis starts with aACE, but focus is on the gaps. These noted gaps will be evaluated during development planning. Notes are collected and consolidated near the end of this phase for the following reasons:

- Customizations should be minimized; they should be accommodated only after all other options are exhausted.
- Many times a perceived need goes away with more knowledge of aACE features.

- Small changes may have readily available workarounds.

The culmination of Discovery is a detailed Development Plan and Final Proposal. The Development Plan includes an itemized list of modifications, the priority of those modifications, and development specifications.

Next Step

[Step 2 – Configuration & Customization](https://aace6.knowledgeowl.com/help/step-2-configuration-and-customization) (<https://aace6.knowledgeowl.com/help/step-2-configuration-and-customization>)
