



***Sample Operations
Analysis Letter***

Using the Sample Operations Analysis Letter

Completed by:	FACTS Implementation Consultant
Purpose:	To confirm the details related to the Operations Analysis, including the purpose, topics to be covered, people involved, date and agenda. Since this is a critical step in the methodology, the letter also asks for management's support of the Operations Analysis.
How it is used:	This letter is provided on the Nexus so you can tailor it for the individual project and your business. Sections that must be personalized are indicated by italicized text. Include an agenda for the meeting (a sample agenda is provided in this section).
When it is used:	Send this letter prior to the Operations Analysis meeting.
Who uses it:	Local FACTS Office only
File under:	Planning/Operations Analysis
Last revised:	05/01
File:	<p>Ops Analysis Letter Agenda.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

Sample Operations Analysis Letter

August 1, 200X

Mr. William B. Jones
President
ACME Distribution
123 Main Street
Anywhere, USA 12345

Dear Bill:

I look forward to working with **company name** in the implementation of FACTS. This letter is to confirm the Operations Analysis survey I will be conducting with **Project Leader name**, your FACTS Project Leader, and other department heads in your company.

I will be conducting the survey on **August 10, 200X** beginning at **9:00 a.m.** and will conclude by **5:30 p.m.** The objective of this meeting is to gain a thorough understanding of how your company currently operates. This information is used to help **Project Leader name**, and myself customize FACTS to your business environment. I plan to meet with each department manager or key user for about **1 to 1-1/2 hours**. Topics we will be covering are:

- Primary job responsibilities
- Daily, monthly and yearly routines/activities
- Exception situations
- How this department passes information to others within your company
- Inquiries, reports, documents, and forms used by the department
- Bottlenecks/Concerns

To insure our time is spent efficiently during this review, it is important that the department managers or key users have completed their portions of the questionnaire and have gathered the requested information (reports, screen layouts, forms, etc.).

In order for the Operations Analysis survey to be successful, your involvement and support is necessary to ensure resources and time are allocated. I have enclosed a tentative agenda of major functional departments I would like to meet with. The questionnaire/survey for each of these departments is found in your Customer Planning Guide. Please distribute this information to the appropriate employees and make them aware of the date and time of the meeting.

Again, I look forward to working with **company name** and to conducting the Operations Analysis Survey.

George Landry
FACTS Implementation Consultant

enclosure

Sample Operations Analysis Agenda

TIME	DEPARTMENT/FUNCTION	DEPARTMENT MANAGER/LEADER
9:00 am – 10:00 am	Accounting General Ledger	<hr/>
10:30 am – 11:30 am	Accounting Accounts Receivable	<hr/>
12:00 pm – 1:00 pm	Accounting Accounts Payable	<hr/>
2:30 pm – 3:30 pm	Warehouse Inventory Purchasing Shipping/Receiving	<hr/> <hr/> <hr/> <hr/>
4:00 pm – 5:30 pm	Customer Service Order Entry Counter Sales Service & Repair Sales Analysis	<hr/> <hr/> <hr/> <hr/> <hr/>