

Distribution Needs Analysis Questionnaire

Company Structure	
How many users?	30
Are there multiple sites? How many and will they be sites of the same company or separate companies?	2
Is there frequent movement of stock between sites?	NO
Describe briefly the types of product that are being sold.	Car Audio Systems, other audio % Brands
If multi-site what functions if any are to be centralised e.g. ledgers, purchasing, collections management (credit control)?	
Database Information	
How many customer accounts?	100
What proportion of these have multiple delivery addresses?	50%
How many items on file?	~1,000
What proportion are active?	500
Quotations	
What proportions of orders are typically preceded by quotations?	Very few, More like contracts
Order Capture	
How many users have order capture as their primary role?	10
Approximately how many orders per day are entered, per company, per site?	25
How are orders taken? e.g. a) E-commerce, b) Via field sales c) Over the telephone d) Fax or post e) EDI f) Trade counter g) Retail Counter If more than one of these try and identify approx percent of each.	Phone, Fax, Web Site EDI
Do the order takers get involved in proactive selling over the telephone? e.g. a) Introducing promotions b) Introducing products linked to the one originally ordered c) Offering substitutes d) Selling highest margin option e) Identifying changes in normal sales pattern	No

Do the order takers need access to technical knowledge on the products?	Somewhat, Not that many lines so products are known.
Would it be helpful for the users to be able to access the order history of items for a particular customer to be able to see: a) Which items the customer typically purchases? b) The price history of a product to a customer? c) The frequency with which they purchase products?	Yes
How are orders with credit issues handled ?	Accounts are monitored, manually
Is it useful to be able to see a history of previous contact with the customer, not just orders, but queries etc arranged with narrative, contact names and sequenced by date?	Yes
Are there regular repeat orders?	Regular, but not repeat, quantities change
Do order takers regularly have a need to be able to see detailed information on stock levels including: a) On hand? b) Available Now? c) Available to Promise? d) On order from Vendor? e) Comparative info across sites?	ALL
Pricing and Promotions	
Are the pricing rules viewed as complex i.e. many customer specific price deals of varying types with date sensitivity or does there tend to be just one or two possible prices for an item?	Yes, multiple brands, contracts
Is the order taker empowered to negotiate prices ?	NO
Does the company run promotions? e.g. a) Buy some get one free b) Buy a specific quantity and get a special price for a limited period.	May do so.
Are customers offered retro discounts, sometimes known as overrides or rebates ? i.e. they receive a rebate payment after a period of time, possibly depending on the volume or value of sales of a specific product mix.	Yes
Items / Inventory	
Is there extensive use of lot control or serial numbers?	FG serial numbers for tracking
Are there frequent additions to and removals from the item file? If so approximately how many per month?	Updated product lines each year
Are there typically multiple units of measure for an item?	Cases, each
Is there any requirement to manage cut-lengths, off-cuts e.g. timber etc?	No
Are products stocked, sold and bought in size / colour / style type ranges?	No

Are products built to order?	No/Yes. There are various brands that are built for particular customers.
What proportion of products are supplied direct from stock i.e. already on the shelf?	
Does the user buy for specific orders i.e. back to back?	Yes
Does the user accept back orders where there is no stock?	Yes
Are some orders delivered direct to the customer by the vendor?	No
Can stock be allocated for customers without a firm order? Is there a need for call-off order type functionality ?	Yes, Maybe
Delivery Service	
What is the typical order to delivery turn round time?	Product built in China. Sold way in advance. Then spot orders for follow up.
Are orders typically being delivered ASAP? If so how is required date calculated?	
Can one order result in more than one delivery due to limited stock availability? What proportion of orders does this happen to?	No
Are customers given differing guaranteed service levels e.g. order by 2pm delivery; by noon next day?	No
Delivery Logistics	
Are picking documents produced: a) As orders are taken? b) Periodically e.g. every hour, every day?	Yes
Is the picking done from: a) An internal picking document that precedes the delivery note and / or invoice? b) The delivery note? <i>Note on terminology. The documentation, which accompanies the goods, is variously known as the delivery note, the packing slip, and the despatch note.</i>	Internal document
Is picking done: a) Order by order? b) Consolidated pick for a number of orders (e.g. a picking "wave")? c) Both?	Order by Order
Is picking done in: a) Walk-round sequence i.e. by bin location? b) Order capture sequence? c) Item sequence ?	Order Capture, Note by brand

Is each item stored in a single fixed location in the warehouse?	One large warehouse in US. Will go to 2 warehouses
If multi-bin a) One picking face with back up bulk stock locations or b) Could one item be picked from a number of locations	A & B
Is there a need for automated data capture of information at picking, receiving, cycle count etc.	Will consider
Is there a requirement for warehouse management functionality? Typical minimum requirement would include warehouse mapping, multi-bin locations per item, bin capacities, directed put away, hand-held terminal assisted operations for receiving and picking, handling efficiency e.g. cross-docking to avoid double handling.	Not really
Is there a need to track a document (delivery) through a series of statuses during the delivery operation e.g. picked, checked, loaded, on load, delivered?	Yes
How are goods delivered? a) Third Party carriers b) Own vehicle fleet c) A mix of the two	A mix
Invoicing	
At what point is the financial invoice typically generated: a) As soon as order is taken? b) It accompanies the delivery? c) As soon as goods have been despatched? d) As soon as there is a confirmed proof of delivery? e) Periodically e.g. end of each week?	At shipment, Per EDI
Is there any consolidated invoicing, i.e. multiple deliveries consolidated into one invoice?	Yes
Are there any additional charges that may needed to be added at invoice point ? e.g. a) Delivery charges b) Statutory charges e.g. recycling taxes c) Deposits on containers etc d) Support and Service charges for specific items	??
After Sales	
Is there a need to track and trace information on goods sold? a) Warranty b) Support contracts c) Lots and serial numbers	Yes, RMA
Is there a field service operation to support goods sold?	NO

Collections & Returns	
Approximately what proportion of invoices currently result in some sort of credit being raised?	TBD
What are the main reasons for returns: a) Pricing error? b) Faulty product? c) Wrong product? d) Other admin error e.g. invoiced wrong account?	Faulty Product
Is any documentation raised to authorise collection, return of goods?	
Once goods have been returned , if there is a credit, will it be raised immediately or may it be dependent upon: a) Detailed goods inspection? b) Await confirm of credit from original vendor? c) Possible decision to repair rather than credit? d) Possible replacement rather than credit?	Inspection
Purchasing / Stock Replenishment	
What is the desired and most appropriate approach to making stock replenishment decisions? a) Regular physical inspection of stock levels to identify shortages b) Regular manual review of stock levels on computer possibly supported by reports, enquiries to assist decision. c) Automatic Purchase Order Generation based upon regular manual reviews of ideal Reorder Level. d) Automatic Purchase Order Generation based upon regular automatic review by the system of reorder levels using a forecasting algorithm.	Would like computer replenishment to assist the purchasing department.
If there is a requirement to automate calculation of reorder levels and ordering requirements... a) Is there significant seasonal variation in sales patterns? b) Is sales history likely to be distorted by single large exceptional transactions? c) Would future sales targets / budgets be used as well as sales history? d) Is there an expectation of using forecasting algorithms such as exponential smoothing?	Yes
If this is a multi-site organisation, does each site purchase independently or is there some centralised purchasing followed by re-distribution of stock to other sites as needed?	Na
Can individual items typically be sourced from more than one vendor implying the need for a choice based upon price, delivery, and quality?	No
Is there a need to hold vendor price lists on the system?	Yes

Are the pricing rules viewed as complex e.g. vendor price deals with quantity or value linked discounts that are date sensitive?	Yes
Do vendors offer retro discounts, sometimes known as overrides? i.e. they give a rebate payment after a period of time.	Yes
Is there a need for significant tracking, chasing of purchase orders? e.g. a) Goods coming from overseas with need to record ship and dock dates etc b) Regular chasing of time-critical items	Yes
Is there an EDI relationship with any vendors for the purposes of placing purchase orders or exchanging any other documentation?	No, Selling Yes
What proportion of purchases are back to back? i.e. specific purchases made to satisfy specific sales orders.	30%
Receipts	
When goods are received can they typically be booked direct into stock or is there a holding / inspection stage?	To Stock, Some inspection
Is there a requirement for the use of hand-held devices and bar-code style automation to assist with put-away to: a) Facilitate item identification and verification? b) Record put-away location?	Yes
Is there a need to hold and record landed costs(on-costs) that will become part of the value of stock? e.g. a) Freight b) Duty c) Insurance	Yes
Does the situation apply where there may be a large number of sales orders waiting on delivery of a specific item from a vendor?	Yes
If so how then how should this item then allocated to these sales orders (especially if there is insufficient to cover all demand): a) Manually? b) Automatically on a first come first served basis? c) Automatically according to user defined criteria e.g. customer class?	C
Vendor Performance	
Is there a need to regularly monitor vendor performance against pre-agreed criteria? e.g. a) Price b) Delivery performance against requested and promised c) Accuracy performance d) Quality – rate of returns of receipts and returns from customers.	B, C, D

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Other:

List (and supply copies of) your most important reports.

Would like various performance reports.
www.bossaudio.com