



Easy to Start. Easy to Use. Easy to Win.



Hertzler Systems Inc.®

Plan the Implementation

Company:

Location:

Completed by:

Date:



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1.

Easy to Start:

- **Easy SPC Resource Kit** - hertzler.com/journey
- **Complimentary Trial** - hertzler.com/trial
- **Implementation** - hertzler.com/implement

Easy to Use:

- **Training** - hertzler.com/training
- **Using** - hertzler.com/coaching
- **Adapting** - hertzler.com/tuneup

2.

Easy to Win:

- **Level 1: "Guard"** - hertzler.com/guard
- **Level 2: "Guide"** - hertzler.com/guide
- **Level 3: "Gain"** - hertzler.com/gain

Introduction

You initially started looking for SPC software because you had a need. As you went through the SPC Requirements workbook, that need has been clarified, a business case has been made, approval has been given, and funds have been allocated.

Let's put all that work together and create a plan to make the implementation successful!

You know your company best – who are the movers, what areas need better data visibility, where will the data come from, and what impact will data visibility have on the culture and on the bottom line. The vendor brings intimate knowledge of his software and its applications, as well as experience implementing it in many different situations. Combining these sources of knowledge creates a perfect partnership for success.

Please refer to Requirements Workbook & ROI Guide when completing this document.

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Should you have any questions while using this workbook,
please feel free to contact us.



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Make a Plan

Everyone may have different ideas of what success looks like. Let's work to define success so that everyone is working toward the same goal.

Create a project charter

What are the high level objectives of this project?

Why is this project important?

What does success look like?

What are the constraints of the project? Scope, budget, time? Resources? _____

Define the project scope

Will the implementation be across the company or will it start out small on one line or one machine? Should there be phases for a controlled roll-out?

What IT resources will be needed and who will coordinate them?

What are the expected outputs for the various stakeholders? Examples include: Control charts for operators and engineers, dashboards with summary data for managers, panel displays for the production floor, etc.

Where will the data come from? Keyboard entry, gages, PLCs, OPC servers? Narrow these down to specific sources? _____



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Will you need real time alarms? What should cause an alarm? Who should be notified and how? Do operators need work instructions so they know what to do in case of an alarm?

Who will need training on what aspects of the software? List the training courses and who will be attending?

Note any exclusions for this project. Exclusions help clarify aspects that will not be included in the project which is especially helpful if some aspects have been talked about but left out in the end.

Define the project scope

Does it need to be completed by a certain date?

Does it need to be started by a certain date?

Are some resources only available during a specific time frame?



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Hardware resources

Work with IT to ensure database and servers are ready to go.

Operators and analysts will need desktops, remote servers, tablets, etc. ready with the software installed.

Cables, gages, and other devices should be lined up and new equipment purchased if necessary.

Personnel resources

Create a Gantt chart or other schedule to make sure that everyone is aware of what is happening, and when they will be needed.

Clear schedules and priorities so that they can focus on the implementation without being interrupted by other requirements.



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Implement the Plan

Now that all the pieces are in place, let's work together to make this plan a success. The hard part is complete; now we have clear goals and objectives. Everyone is working toward the same thing.

Finalize the schedule

Once dates are set, verify that hardware resources will be ready and people will be available when needed.

Especially for training, it is important to have the participants available for the whole time allotted. Of course, emergencies come up. Try to limit interruptions to emergencies.

Our team and your team work together to complete the plan!

As you complete the training and start the installation, variations and improvements may be found. Identify tasks that are outside of the defined project scope, and either save them for the next project or submit a change control to complete them now.

Depending on the size and complexity of the project you may want to schedule check-ins with our team and your team. The check-ins verify that the work is on schedule and give you a chance to voice any concerns.



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Review the Plan

Now that the work has been completed, take some time to review the plan.

Was the plan successful?

Were all aspects of the scope completed? And change controls?

Were the goals and objectives met?

Is there more work that needs to be completed on your end? By the vendor?

Now that the implementation is in place, do you have any enhancements or future projects in mind?

Can you make data entry easier and cleaner?

Can you make the data more visible to help drive decision making? _____

Are there other lines, plants, work cells, etc. that would benefit from a similar implementation?



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Immediate review is beneficial, but don't forget to come back later for a long-term review.

Is the expected ROI on track?

Are there unexpected returns to the bottom line?

Are operators and analysts still using the system as it was designed?

Are operators and analysts using the data in unexpected ways?

Are there other lines, plants, work cells, etc. that would benefit from a similar implementation?



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