P.01

TRANSACTION REPORT

SEP-25-90 TUE 16:11

DATE	START	RECEIVER	TX TIME	PAGES	NOTE
SEP-25	16:08	13125070970	3'32"	6	OK

INPUT®

Parsippany Place Corporate Center, Suite 201, 959 Route 46 East, Parsippany, NJ 07054 (201) 299-6999

FAX No. (201) 263-8341

FAX TRANSMITTAL FORM

COVER SHEET - Page 1

DESTINATION: Anderson Consulting

FAX NUMBER: 312-507-0970

ATTENTION: Pam Godwin

Telephone Number/Location _____

FROM: Joanne Bonnett

DATE: 9/25/90

PAGES: 1 of 6

TYPE: CONFIDENTIAL CORRESPONDENCE YES ____ NO ____

URGENT YES ____ NO ____

CHARGE CODE: _____

COMMENTS:

Pam -
The questionnaire as promised.

Joanne

4WACPL
for CA
10/90

MATERIALS MANAGEMENT PRODUCT ASSESSMENT QUESTIONNAIRE

The objective of this interview is to obtain the opinions of key IS (Information Systems) executives and functional managers on a potential materials management offering currently in the planning stages by a major supplier of software and services. The interview explores: market potential for several major vertical industries; information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities; and buyer values.
Respondent names will remain confidential; i.e. will not be disclosed to INPUT's client.

For purposes of the interview, we will define a materials management system as one which minimally supports purchasing, material requisitioning, and inventory management.

We'll start out by getting a little information about the size of your firm and the level of IS expenditures, etc.

DEMOGRAPHICS

1.1	Industry	_____	By US Industrial major SIC Classification
1.2	Annual Revenues	_____	In Millions of Dollars
1.3	*IT* Budget	_____	Corporate (Estimated/Millions) Is S/W included ? Y/N
1.4	*IT* Budget	_____	Divisional (Estimated/Millions) Is S/W included ? Y/N
1.5	Title	_____	Of Respondent

Now we'll move on to a few questions regarding how automation is presently handled for materials management within your firm.

PRESENT STATUS

2.1 Do you currently have an installed system to support the materials management function?
____ Y ____ N
(If no, skip to section **FUTURE PLANS**.)

We would like to know more about what materials management functions the system handles, how tightly integrated these functions are from a systems viewpoint; and whether the software utilized was a purchased package or custom built to meet your specific needs. For each of the following functional capabilities, please indicate whether:

- The system has the capability. (Y/N)
- You consider it tightly integrated with other capabilities. (Y/N)
- The functional capability under discussion was purchased or custom developed. (P/C)

PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	EXISTS Y/N	INTEGRATED Y/N	PUR/CUS P/C
2.2	Purchasing *(Vendor Management)*			
2.3	Material Requisitioning			
2.4	Inventory Control *(Inventory Accounting)*			
2.5	Cataloging *(Of Item Characteristics & Compatible Units)*			
2.6	Forecasting & Inventory Plng.			
2.7	Warehouse Management *(Distributed and/or Sophisticated Capabilities)*			
2.7a	Accounts Payable			
2.7b	General Ledger			

2.8 *[If the respondent did not indicate that outside software was used, skip this questions.]* Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

PACKAGE	VENDOR	FUNCTION

2.9 When was the last time you considered making a major upgrade to the systems used to support the materials management function? *[Year is adequate]*

____

3.0 When will you be re-examining this question? *[Year/No Plan]*

_____

FUTURE PLANS

During this section of the interview, I'd like to discuss your future requirements for systems to support the materials management function, as well as those aspects of your computer environment which would make the selection of outside packages more or less attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the interview we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level and 5 being the highest.

[Interviewers Note: In some instances we have also asked the respondent to respond to specific capabilities within a major function. In these instances you might want to prompt the interviewee by saying indicating that your dealing with a sub-function.]

ID	FUNCTIONAL CAPABILITY/MODULE	IMPORTANCE 1 - 5	IMPORTANCE 1 - 5
4.0	Purchasing, Vendor Management		
4.1	Vendor Analysis		
4.2	3 Way Match (Invoice, Receipt, PO)		
4.3	Word Processing for Extended Text		
4.4	EDI		
4.5	Material Requisitioning		
4.6	Allocations/Reservations		
4.7	Work Orders		
4.8	Inter-store Transfer Orders		
4.8a	Other order types (patient orders,etc.)		
4.9	Inventory Control		
5.0	Time-phased Replenishment Policies		
5.1	Cataloging		
5.2	Bill of Material (equipment/spare parts,kiting, compatible units)		
5.3	Forecasting & Inventory Planning		
5.4	Distribution Requirements Planning (DRP)		
5.5	Warehouse Management		

5.6 Are there any significant or unique requirements that would need to be included for your industry which have not been mentioned above; e.g. encumbrance processing or micro-based functions for small stores inventory management? If so, please indicate below:

_____
_____
_____
_____

5.7 To what degree would you consider looking to an outside packaged solution to meet the kinds of requirements you've specified above. Please indicate your degree of interest in an outside package using the 1 - 5 rating, with one being the lowest and 5 the highest.

____

5.8 (For 1-3 above only) Describe the characteristics of a custom solution that would make it more attractive than a package solution in you environment.

_____
_____
_____
_____

5.9 What would you anticipate spending for a system which meets the kinds of requirements that were specified above? Please identify the expected range.

___ Under $250K, ___ $250-500K, ___ $500-1000K, ___ Over One Million

ARCHITECTURAL CONSIDERATIONS

Applications systems such as the one under discussion can be implemented across a wide variety of hardware and software platforms. As the final portion of this interview we would like to get your views on the preferred architecture for the materials management system under discussion. For each of the alternatives listed below please indicate your preference by rating the alternative on a scale of 1 to 5, with 1 being the lowest rating and 5 being the highest.

ID	ARCHITECTURAL CHARACTERISTIC	1 - 5
6.0	Mainframe Processing for Primary Systems	
6.1	Cooperative Processing Interface for User Workstations Using Windows Technology	
6.2	Complementary Capability to Run Applications in Dumb Terminal Mode	
6.3	Distributed Capability for Functions Such As Warehouse Management & Purchasing	

6.4 If there are preferred alternatives for one or more of these architectural characteristics, please indicate the characteristic and the preferred alternative.

_____
_____
_____
_____

That ends our interview, we want to thank you for the time and consideration that you have given us. If there are other people you think that we should talk to in your company, please let us know who they are, and we'll follow up:

_____
_____
_____
_____

MATERIALS MANAGEMENT PRODUCT ASSESSMENT QUESTIONNAIRE

The objective of this interview is to obtain the opinions of key IS (Information Systems) executives and functional managers on a potential materials management offering currently in the planning stages by a major supplier of software and services. The interview explores: market potential for several major vertical industries; information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities; and buyer values. Respondent names will remain confidential; i.e. will not be disclosed to INPUT's client.

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DEMOGRAPHICS

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1.2	Annual Revenues	_____	In Millions of Dollars
1.3	*IT* Budget	_____	Corporate (Estimated/Millions)
1.4	*IT* Budget	_____	Divisional (Estimated/Millions)
1.5	Title	_____	Of Respondent

Now we'll move on to a few questions regarding the how automation is presently handled for materials management within your firm.

PRESENT STATUS

2.1 Do you currently have an installed system to support the materials management function?
_____Y _____N
(If no, skip to section **FUTURE PLANS**.)

We would like to know more about what materials management functions the system handles, how tightly integrated these functions are from a systems viewpoint; and whether the software utilized was a purchased package or custom built to meet your specific needs. For each of the following functional capabilities, please indicate whether:

- The system has the capability. (Y/N)
- You consider it tightly integrated with other capabilities. (Y/N)
- The functional capability under discussion was purchased or custom developed. (P/C)

PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	EXISTS Y/N	INTEGRATED Y/N	PUR/CUS P/C
2.2	Purchasing *(Vendor Management)*			
2.3	Material Requisitioning			
2.4	Inventory Control *(Inventory Accounting)*			
2.5	Cataloging *(Of Item Characteristics & Compatible Units)*			
2.6	Forecasting & Inventory Plng.			
2.7	Warehouse Management *(Distributed and/or Sophisticated Capabilities)*			

2.8 *[If the respondent did not indicate that outside software was used, skip this questions.]* Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

PACKAGE	VENDOR	FUNCTION

2.9 When was the last time you considered making a major upgrade to the systems used to support the materials management function? *[Year is adequate]*

____

3.0 When will you be re-examining this question? *[Year/No Plan]*

_____

FUTURE PLANS

During this section of the interview, I'd like to discuss your future requirements for systems to support the materials management function, as well as those aspects of your computer environment which would make the selection of outside packages more or less attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the interview we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level and 5 being the highest.

[Interviewers Note: In some instances we have also asked the respondent to respond to specific capabilities within a major function. In these instances you might want to prompt the interviewee by saying indicating that your dealing with a sub-function.]

ID	FUNCTIONAL CAPABILITY/MODULE	IMPORTANCE 1 - 5	IMPORTANCE 1 - 5
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4.3	Word Processing for Extended Text		
4.4	EDI		
4.5	Material Requisitioning		
4.6	Allocations/Reservations		
4.7	Work Orders/Customer Orders		
4.8	Inter-store Transfer Orders		
4.9	Inventory Control		
5.0	Time-phased Replenishment Policies		
5.1	Cataloging		
5.2	Bill of Material		
5.3	Forecasting & Inventory Planning		
5.4	Distribution Replacements Planning (DRP)		
5.5	Warehouse Management		

5.6 Are there any significant or unique requirements that would need to be included for your industry which have not been mentioned above; e.g. encumbrance processing or micro-based functions for small stores inventory management? If so, please indicate below:

_____

_____

_____

_____

5.7 To what degree would you consider looking to an outside packaged solution to meet the kinds of requirements you've specified above. Please indicate your degree of interest in an outside package using the 1 - 5 rating, with one being the lowest and 5 the highest.

____

5.8 Describe any characteristics of a packaged solution that would increase the attractiveness of the package over a custom solution.

_____
_____
_____
_____

5.9 What would you anticipate spending for a system which meets the kinds of requirements that were specified above? Please identify the expected range.

___ Under $250K, ___ $250-500K, ___ $500-1000K, ___ Over One Million

ARCHITECTURAL CONSIDERATIONS

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ID	ARCHITECTURAL CHARACTERISTIC	1 - 5
6.0	Mainframe Processing for Primary Systems	
6.1	Cooperative Processing Interface for User Workstations Using Windows Technology	
6.2	Complementary Capability to Run Applications In Dumb Terminal Mode	
6.3	Distributed Capability for Functions Such As Warehouse Management & Purchasing	

6.4 If there are preferred alternatives for one or more of these architectural characteristics, please indicate the characteristic and the preferred alternative.

_____
_____
_____
_____
_____

That ends our interview, we want to thank you for the time and consideration that you have given us. If there are other people you think that we should talk to in your company, please let us know who they are, and we'll follow up:

_____

_____

_____

_____

MATERIALS MANAGEMENT PRODUCT ASSESSMENT QUESTIONNAIRE

The objective of this interview is to obtain the opinions of key IS (Information Systems) executives and functional managers on a potential materials management offering currently in the planning stages by a major supplier of software and services. The interview explores: market potential for several major vertical industries; information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities; and buyer values. Respondent names will remain confidential; i.e. will not be disclosed to INPUT's client.

For purposes of

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DEMOGRAPHICS

1.1	Industry	_____	By US Industrial major SIC Classification
1.2	Annual Revenues	_____	In Millions of Dollars
1.3	*IT* Budget	_____	Corporate (Estimated/Millions)
1.4	*IT* Budget	_____	Divisional (Estimated/Millions)
1.5	Title	_____	Of Respondent

Now we'll move on to a few questions regarding ~~the~~ how automation is presently handled for materials management within your firm.

PRESENT STATUS

2.1 Do you currently have an installed system to support the materials management function?

_____ Y _____ N

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- The system has the capability. (Y/N)
- You consider it tightly integrated with other capabilities. (Y/N)
- The functional capability under discussion was purchased or custom developed. (P/C)

PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	EXISTS Y/N	INTEGRATED Y/N	PUR/CUS P/C
2.2	Purchasing *(Vendor Management)*			
2.3	Material Requisitioning			
2.4	Inventory Control *(Inventory Accounting)*			
2.5	Cataloging *(Of Item Characteristics & Compatible Units)*			
2.6	Forecasting & Inventory Plng.			
2.7	Warehouse Management *(Distributed and/or Sophisticated Capabilities)*			

Year is adequate

2.8 *[If the respondent did not indicate that outside software was used, skip this questions.]* Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

PACKAGE	VENDOR	FUNCTION

2.9 When was the last time you considered making a major upgrade to the systems used to support the materials management function? *[Year is adequate]*

_____

3.0 When will you be re-examining this question? *[Year/No Plan]*

_____

FUTURE PLANS

During this section of the interview, I'd like to discuss your future requirements for systems to support the materials management function, as well as those aspects of your computer environment which would make the selection of outside packages more or less attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the interview we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level and 5 being the highest.

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4.0	Purchasing, Vendor Management		
4.1	Vendor Analysis		
4.2	3 Way Match (Invoice, Receipt, PO)		
4.3	Word Processing for Extended Text		
4.4	EDI		
4.5	Material Requisitioning		
4.6	Allocations/Reservations		
4.7	Work Orders/~~Customer~~ Orders		
4.8	Inter-store Transfer Orders		
	Order orders, dupes (partial orders, etc)		
4.9	Inventory Control		
5.0	Time-phased Replenishment Policies		
5.1	Cataloging		
5.2	Bill of Material (equipment/appurtenants, kitting, complete sets, etc)		
5.3	Forecasting & Inventory Planning		
5.4	Distribution ~~Replacements~~ requirements Planning (DRP)		
5.5	Warehouse Management		

5.6 Are there any significant or unique requirements that would need to be included for your industry which have not been mentioned above; e.g. encumbrance processing or micro-based functions for small stores inventory management? If so, please indicate below:

_____

_____

_____

_____

5.7 To what degree would you consider looking to an outside packaged solution to meet the kinds of requirements you've specified above. Please indicate your degree of interest in an outside package using the 1 - 5 rating, with one being the lowest and 5 the highest.

___

(for 13 only) the custom make it more attractive than a package solution in your assessment.

5.8 Describe any characteristics of a packaged solution that would increase the attractiveness of the package over a custom solution.

___

___

___

___

5.9 What would you anticipate spending for a system which meets the kinds of requirements that were specified above? Please identify the expected range.

___ Under $250K, ___ $250-500K, ___ $500-1000K, ___ Over One Million

ARCHITECTURAL CONSIDERATIONS

Applications systems such as the one under discussion can be implemented across a wide variety of hardware and software platforms. As the final portion of this interview we would like to get your views on the preferred architecture for the materials management system under discussion. For each of the alternatives listed below please indicate your preference by rating the alternative on a scale of 1 to 5, with 1 being the lowest rating and 5 being the highest.

ID	ARCHITECTURAL CHARACTERISTIC	1 - 5
6.0	Mainframe Processing for Primary Systems	
6.1	Cooperative Processing Interface for User Workstations Using Windows Technology	
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6.3	Distributed Capability for Functions Such As Warehouse Management & Purchasing	

6.4 If there are preferred alternatives for one or more of these architectural characteristics, please indicate the characteristic and the preferred alternative.

___

___

___

___

___

That ends our interview, we want to thank you for the time and consideration that you have given us. If there are other people you think that we should talk to in your company, please let us know who they are, and we'll follow up:

_____

_____

_____

_____

INPUT

1280 Villa Street, Mountain View, CA 94041 (415) 961-3300
Telex 171407 Fax (415) 961-3966

708
312-587-8673

FAX TRANSMITTAL FORM

Pam Goodwin
Anderson Consulting

DESTINATION: Travel NJ

FAX NUMBER: 201-263-8341

fax.

ATTENTION:

Telephone Number/Location

NUMBER OF PAGES: 1 OF 6

Confidential Yes ____ No ✓

Urgent Yes ✓ No ____

DESCRIPTION:

1 code? need by 10/3

2. typos. - will fix

3 mail/fax yes - no references to AC.

4 size of firm high end fortune 500, 1000.

5 Converse w/ DB. yes.

6. thank you. do not promise 25-30 4.5/day

IS exec or material mgmt person
Search

definitions: Util Trans. telecom.

Info. Ins. BF Healthcare
SAL/FED.

FROM. Dorothy Maxwell

DATE: 9/21/90

INPUT
Project Charge Code:

FILE: ____ CHRON ____ CONTACT ____ OTHER

Specify:

MEMORANDUM

DATE September 21, 1990

TO: Joanne

FROM: Denny Wayson

SUBJECT: ATTACHED QUESTIONNAIRE

Here is the preliminary questionnaire for the interviews for next week. I'm reviewing the questionnaire with Andersen Consulting here at the office this morning. Will give you sample information and any revisions this afternoon. I'll call after the meeting with Andersen.

MATERIALS MANAGEMENT PRODUCT ASSESSMENT QUESTIONNAIRE - ANDERSEN CONSULTING

The objective of this interview is to obtain the opinions of key IS (Information Systems) executives and functional managers on a potential materials management offering current in the planning stages by a major supplier of software and services. The interview explores: market potential for several major vertical industries; information on respondents current posture with regard to systems in use by the materials management function; interest levels in proposed functional capabilities; and buyer values. For purposes of the interview we will define a core materials management system as one which minimally supports: the cataloging, purchasing, material requisitioning and inventory control management and provides direct interfaces to such other systems as vendor management, forecasting & planning, inter-store transfer control and management reporting.

We'll start out by getting a little information about the size of your firm and the level of IS expenditures, etc.

DEMOGRAPHICS

1.1	Industry	_____	By US Industrial major SIC Classification
1.2	Annual Revenues	_____	In Millions of Dollars
1.3	IT Budget	_____	Corporate (Estimated/Millions) Is software included Y/N
1.4	IT Budget	_____	Divisional (Estimated/Millions) Is software included Y/N
1.5	Title	_____	Of Respondent

Now we'll move on to a few questions regarding the how automation is presently handled for materials management within your firm.

PRESENT STATUS

2.1 Do you currently have and installed system to support the materials management function?

____ Y ____ N

(If no, skip to sectio FUTURE PLANS.)

We would like to know more about what materials management functions the system handles, how tightly integrated these functions are from a systems viewpoint; and whether the software utilized was purchased (tailored) or custom built to meet your specific needs. For each of the following functional capabilities, please indicate whether: to do what?

- The system has the capability. (Y/N)
- You consider it tightly integrated with other capabilities. (Y/N)
- The functional capability under discussion was purchased or custom developed. (P/C) by whom?

PRESENT STATUS - Continued

ID	FUNCTIONAL CAPABILITY/MODULE	ECSTS Y/N	INTEGRATED Y/N	PUR/CUS P/C
2.2	CORE - Cataloging			
2.3	CORE - Purchasing			
2.4	CORE - Material Requisitioning			
2.5	CORE - Inventory Control			
2.6	SECONDARY - Forecasting & Inventory Plng.			
2.7	SECONDARY - Inter-Store Transfer Control			
2.8	SECONDARY - Vendor Management			
2.9	SECONDARY - Management Reporting			
3.0	SECONDARY - Inventory Accounting			
3.1	RELATED - Stores Inventory			
3.2	RELATED - Warehouse Management			

3.3 *[If the respondent did not indicate that outside software was used, skip this questions.]* Please describe any current purchased software that you are utilizing in support of the materials management function. The name of the package and vendor and function, if possible.

9. to I

PACKAGE	VENDOR	FUNCTION

3.4 When was the last time you considered making a major upgrade to the systems used to support the materials management function? *[Year is adequate]*

_____

3.5 When will you be re-examining this question? *[Year/No Plan]*

_____

FUTURE PLANS

During this section of the interview, I'd like to discuss your future requirements for systems to support the materials management function, as well as, those aspects of your computer environment which would make the selection of outside packages, more or less, attractive. We'll start with getting your opinions on the importance of the various functional capabilities we discussed before. For this part of the interview we'll measure your interest in the functional capability by asking you to rate its importance on a scale of one to five, with [1] being the lowest interest level, and [5] being the highest; and asking you to indicate whether you would consider an outside software package to perform the function.

ID	FUNCTIONAL CAPABILITY/MODULE	IMPORTANCE 1 - 5	BUY OUTSIDE? Y/N
4.0	CORE - Cataloging		
4.1	CORE - Purchasing		
4.2	CORE - Material Requisitioning		
4.3	CORE - Inventory Control		
4.4	SECONDARY - Forecasting & Inventory Ping.		
4.5	SECONDARY - Inter-Store Transfer Control		
4.6	SECONDARY - Vendor Management		
4.7	SECONDARY - Management Reporting		
4.8	SECONDARY - Inventory Accounting		
4.9	RELATED - Stores Inventory		
5.0	RELATED - Warehouse Management		

If your comapany were to consider a new systems for the materials management area, to what degree would each of the following functions/managers participate. Please indicate their degree of influence on the decision by rating on a scale of 1 to 5, with one being the lowest influence and 5 being the highest.

5.1 Materials Management _____
5.2 Purchasing Management _____
5.3 Financial Management _____
5.4 IS Management _____

Please rank ~~the from~~ the criteria by which the decision would be evaluated. [Highest rank should be rated 1. *[A blank space has been supplied for respondents to supply criteria that have not been included in the list.]*

5.5. Functional Capabilities ____
5.6 Cost ____
5.7 Ease of Fit With Existing Systems ____
5.8 EDI and Messaging Capabilities ____
5.8 Compliance With Corporate Standards ____
5.9 _____ ____

ARCHITECTURAL CONSIDERATIONS

Applications systems such as the one under discussion can be implemented across a wide variety of hardware and software platforms. As the final portion of this interview we would like to get your views on the preferred architecture for the materials management system under discussion. For each of the alternatives listed below please indicate your preference by rating the alternative on a scale of 1 to 5, with 1 being the lowest rating and 5 being the highest.

ID	ARCHITECTURAL CHARACTERISTIC	1 - 5
6.0	Mainframe Processing for Primary Systems	
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6.2	Complementary Capability to Run Applications in Dumb Terminal Mode	
6.3	Distributed Capability for Functions Such As Stores Inventory and Warehouse Management	

If there are preferred alternatives for one or more of these architectural characteristics, please indicate the characteristic and the preferred alternative.

_____
_____
_____
_____
_____

That ends our interview, we want to thank you for the time and consideration that you have given us. If there are other people you think that we should talk to in your company, please let us know who they are, and we'll follow up:

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