

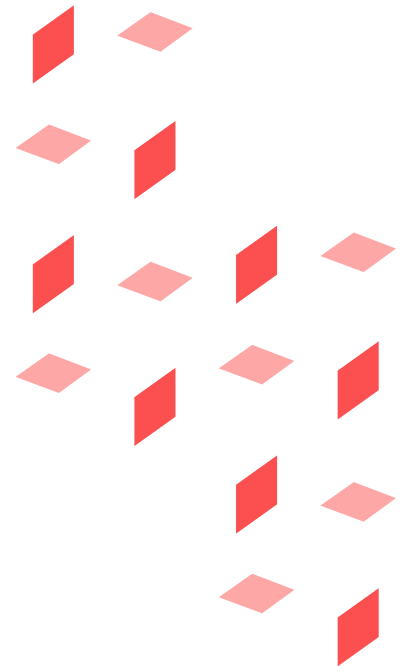
Manufacturing App Playbook

Help your manufacturing clients choose the right apps for inventory management and more



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Manufacturer app needs by **sector**

Which apps suit which companies?

Cloud apps won't necessarily be suitable for every manufacturer you work with. If they operate in rural areas with connectivity issues or poor internet speeds, for example, they'll likely have a problematic experience.

Size makes a difference too. Cloud solutions tend to offer the greatest value to small and medium-sized manufacturers. A company with over 100 staff, on the other hand, will have different investment priorities – for example within the automation or internet of things space.

Similarly, a client may simply have a preference for an all-in-one ERP solution – if the key decision-maker is familiar with a particular package from a former role perhaps. Or there may be an industry-specific tool available, such as ApparelMagic for clothes makers, that they'd prefer.

Many industries, though, will get the most benefit out of a best-of-breed cloud app combination such as Unleashed+Xero. So let's start by looking at the types of manufacturers that are likely to need your advice the most.



App needs by manufacturing sector



Food and beverage

With high volumes of limited shelf-life inventory, these manufacturers have special requirements

- Batch tracking of raw material inventory to avoid the costs of ingredients expiring
- Accurate audit trails in the case of a product recall
- Attribution of production costs (e.g. labour, or third-party charges) for accurate costing of finished goods
- View of margins by product and channel to drive profit growth and strategy
- Multichannel sales to grow revenue, spread risk and build resilience

Example companies



Building and construction

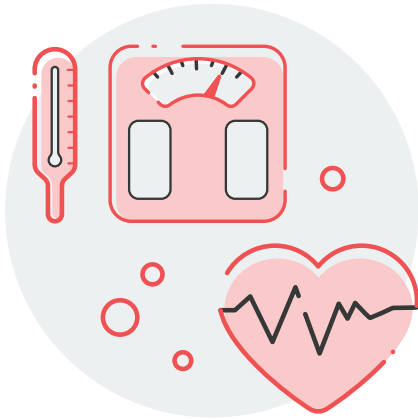
Supplying building and construction materials involves close management of both customers and products

- CRM to manage key contacts, accounts and projects
- Make to order functions to reduce finished goods inventory
- Batch and serial number tracking for traceability
- Online client ordering portal to reduce admin
- View of margins by product and channel to drive profit growth and strategy

Example companies



STONE UK
NATURAL BRITISH STONE



Health and medical equipment

Successful companies in this space connect sales systems with inventory, closely manage customer relationships, and accurately track their labour costs by product

- CRM to manage key contacts, accounts and projects
- Accurate audit trails in the case of a product recall
- Serial number tracking improves management of high-value componentry, and aids warranty process after sales
- Mobile sales and inventory management for more effective sales and fulfillment in the field

Example companies



Electronics and telecoms

Multi-level BOMs need close tracking and management. Early adopters of tech may also be hindered by legacy systems, and need an update

- Serial number tracking improves management of high-value componentry
- Warehouse management and inventory control efficiencies
- Lead time tracking to reduce production downtime
- Mobile sales and inventory management for more effective sales and fulfillment

Example companies





Medical supplies

These manufacturers have similar needs to food and beverage companies, but with added regulatory oversight

- Batch and serial number tracking for compliance with product recall legislation
- Improved purchase order and sales order management
- Accurate view of margins by product and channel to drive profit growth and strategy

Example companies



The NativeAntigen
COMPANY

VIVACY
PARIS



Furniture and fixtures

Managing margins and production efficiency is critical as these companies seek to stay in touch with changing trends

- Efficient Bills of Materials management that captures all costs
- Accurate view of margins by product and channel to drive profit growth and strategy
- B2B sales portal to reduce admin
- Warehouse management and inventory control efficiencies

Example companies



PRINCE LIONHEART®

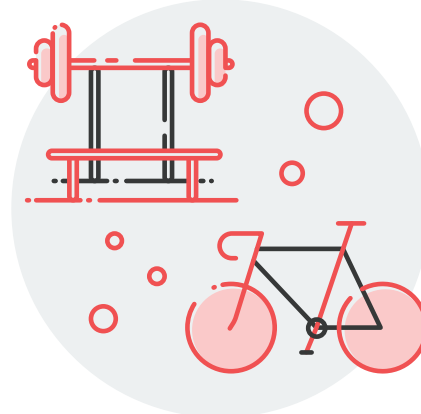


Metals and fabrication

Productive efficiency is a key focus area for capital intensive industries

- Efficient Bills of Materials management that captures all costs
- Supplier management to reduce production downtime
- Improved purchase order and sales order management

Example companies



Sport and entertainment

A close relationship between production and sales drives growth in these companies

- Mobile sales and inventory management for more effective sales and fulfillment
- Multichannel sales to grow revenue, spread risk and build resilience
- Accurate view of margins by product and channel to drive profit growth and strategy

Example companies



LAZER

ANCE LIGHTING

FASTER GO SAFER



Lazer Lamps

Identifying **client** need

Creating a business profile

Before you can recommend any apps to your client, you'll need to build an accurate picture of their business: including what problems they're trying to solve, and what their goals are.

Here are the areas we suggest you cover.



Goals

What are your client's ambitions for the next 1-2 years? What are their goals over the next few months?



Pain points

What are the main issues holding them back?



Technology

What software are they currently working with? Is their accounting/bookkeeping already run through the cloud? If only a handful of the key financial personnel currently use the accounting software, while operations staff manually provide their own inputs, then a cloud solution will provide huge value.



Proficiency

Identify whether your client has technological expertise within their team, and whether staff are ready to use cloud tools.



Manufacturing style

There are two main types of manufacturers: those who make to order, and those who make to stock. Where do they fit?



Now build the details

Use these questions to build as accurate a profile of the company and its current state of play as you can.

How do they operate?

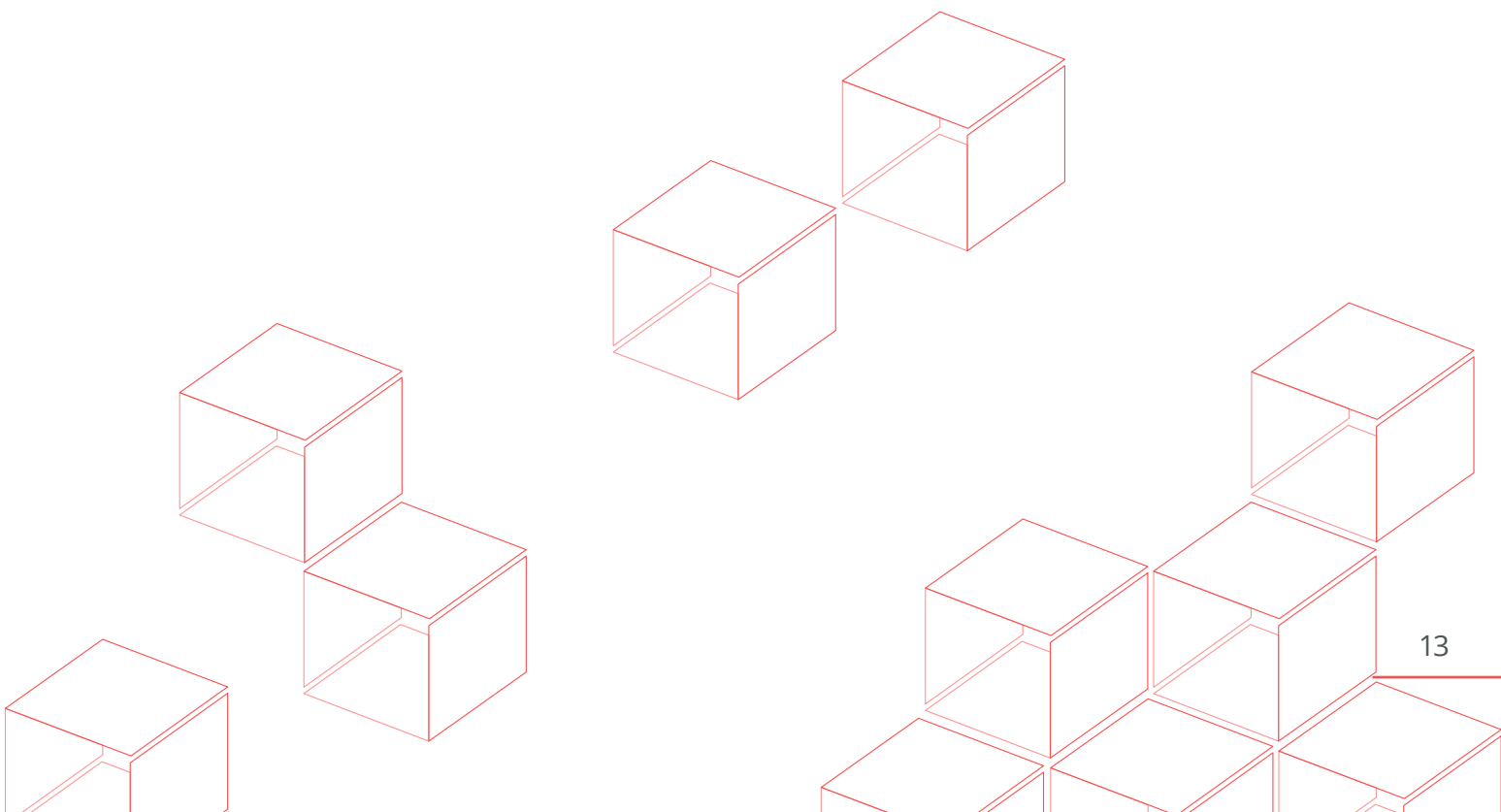
- How many product codes do they use?
- What products do they have to bundle / kitset / assemble?
- Are they assembling / manufacturing a finished product for sale?
- Do they have serialised products that need tracking?
- What are their needs around batch tracking / expiry of products?
- How many warehouses do they have?
- What sales channels do they currently have? What's working and what's not?
- How do they track and manage their customers?
- What performance metrics do they track? What internal data can they access?

What are their timeframes?

- What upcoming events/deadlines will drive having a solution in place?
- What plans are there for major projects?
- What are their financial goals for the next two quarters?
- Can those goals be met without some sort of change?

Financial factors

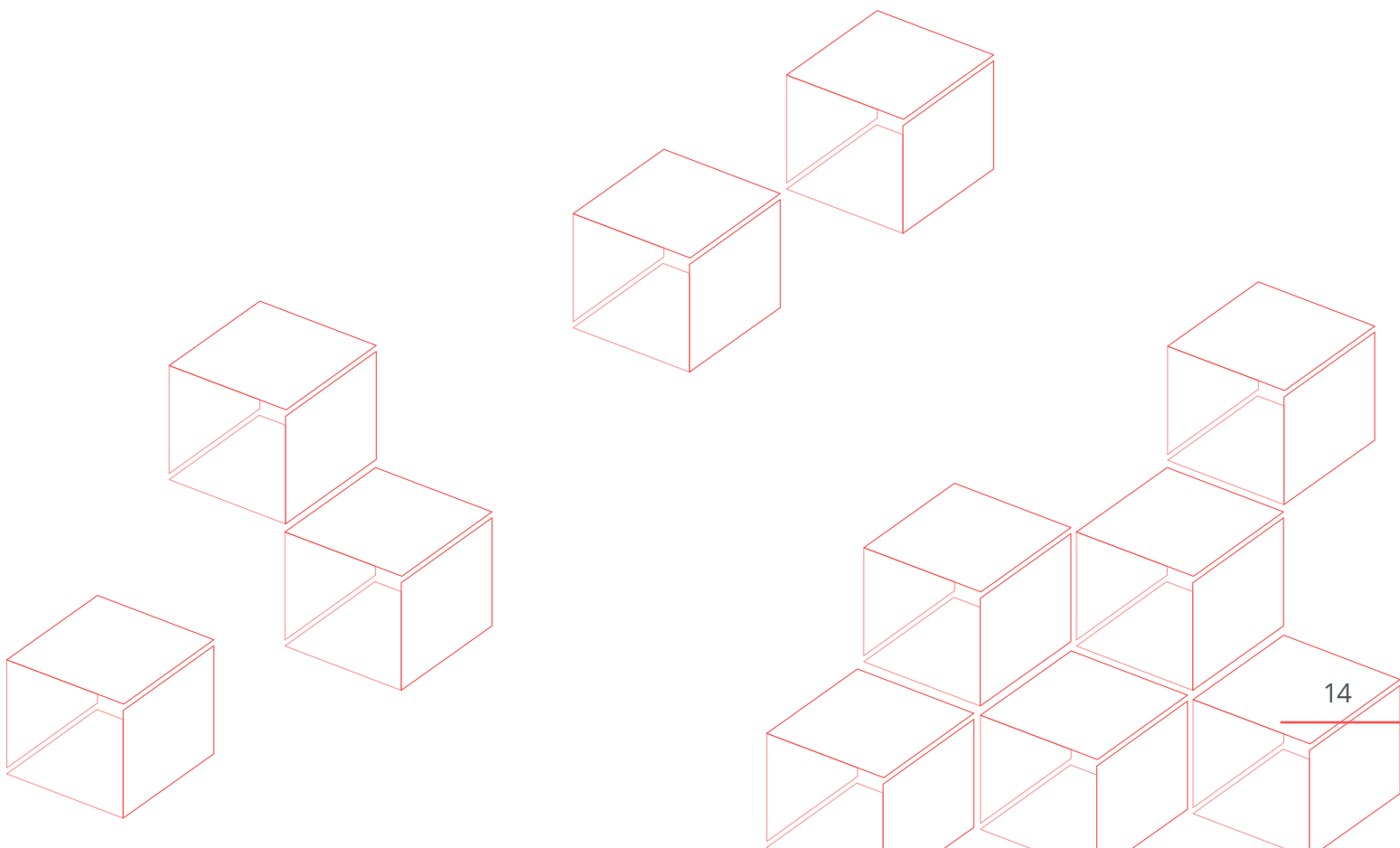
- What do they currently spend on their pain points? What are the opportunity costs of not addressing them?
- What potential gains can addressing these bring?
- What budget do they have set aside for addressing their goals / issues?
- What ROI are they hoping for?



What are their real problems?

Look beyond the finance / exec team to investigate wider organisational processes. Here you'll likely uncover the real problems holding the business back

- How accurate is their stock valuation at year-end?
- How many operational processes are duplicated across teams?
- How accessible is their operational data if they're required to work from home?
- How do their customers order from their business currently?
- How often do they take returned stock from customers?
- How up to date are their BOM costs?
- How do they factor staff labour into the cost of goods?
- What problems does the business have and when did they identify them?
- What steps have they already taken to address them?
- How important is addressing these problems to their goals – both company-wide or departmental?
- What happens if they don't address their pain points?
- What are their top priorities at the moment? Where do these issues fit on that list?



Make to order versus make to stock manufacturers

Manufacturers who make to order and those who make to stock will have different requirements in terms of features and functionality. Here's how to identify which type your client is.

Make to order (MTO)	Make to stock (MTS)
<ul style="list-style-type: none">• Work on a 'pull production' model, creating assemblies as and when a customer creates an order• May take prepayments from customers• Often sell customised final products• Use lead times when estimating delivery dates	<ul style="list-style-type: none">• Fulfil orders with finished goods already manufactured in the warehouse• Rarely take prepayments• Most products not customised• Only use delivery information for estimating delivery dates• Often sell wholesale or multi channel
Common MTO companies	Common MTS companies
Electronics and telecoms, building and construction manufacturers, furniture and fixtures, metals and fabrication	Food and beverage manufacturers, health and medical supplies companies, sports and entertainment industry, FMCG

Setting out goals: growth versus productivity

Most of your clients will either want to scale their operations or find new efficiencies – or even achieve both at the same time.

Growth

Taking on more staff, selling at new levels or getting picked up by a major chain are all common goals for manufacturers. Cloud apps can help your clients achieve all of them

Productivity

Some companies are happy at their current size – but want to manufacture their products much more efficiently. They might be aiming to reduce their admin burden, or to improve their financial position by growing margins



Watson Gym Equipment

What make-to-order manufacturers need

Primary business strategy	Features they'll need	Apps they'll need
Digital for growth (new customers, new markets, new products)	<ul style="list-style-type: none">• Split invoicing• Customisable ordering• Capture labour costs and COGS• Lead time tracking• Place multiple POs at once• Quoting• Mobile sales app• Cloud accounting• Track leads and manage customers• Data insights	<ul style="list-style-type: none">• Unleashed• Xero• Prospect CRM• Chaser• Unleashed Business Intelligence Vision
Digital for productivity (less admin, less downtime, more strategic decision-making)	<ul style="list-style-type: none">• Split invoicing• Customisable ordering• Capture labour costs and COGS• Lead time tracking• Place multiple POs at once• Quoting• B2B self-service sales portals• Cloud accounting• Data insights	<ul style="list-style-type: none">• Unleashed• Xero• Chaser• Unleashed Business Intelligence Vision

What make-to-stock manufacturers need

Primary business strategy	Features they'll need	Apps they'll need
Digital for growth (new customers, new markets, new products)	<ul style="list-style-type: none"> • Batch/serial tracking • Production scheduling • Capture labour costs and COGS • Demand forecasting • Streamlined fulfillment • Data insights • Multichannel sales 	<ul style="list-style-type: none"> • Unleashed • Xero • Shopify • Inventory Planner • Unleashed Advanced Shipping • Unleashed Business Intelligence Vision
Digital for productivity (less admin, less downtime, more strategic decision-making)	<ul style="list-style-type: none"> • Batch/serial tracking • Production scheduling • Capture labour costs and COGS • Demand forecasting • Streamlined fulfillment 	<ul style="list-style-type: none"> • Unleashed • Xero • Inventory Planner • Unleashed Advanced Shipping





Choosing your apps








Breaking down inventory functionality

If you choose Xero and Unleashed, you won't need any of Xero's inventory management features. So here, we can compare Sage's inventory functionality directly with Unleashed's.

Sage offers several products, each with a different suite of features. Here's how Sage 50 Standard, Sage 50 Professional, Sage 200cloud and Sage 200cloud Professional stack up against Unleashed's Medium Plan.

	50 Standard	50 Professional	20cloud Standard	20cloud Professional	Unleashed Medium
Track and manage stock	✓	✓	✓	✓	✓
Create sales and purchase orders	✗	✓	✓	✓	✓
Multiple currencies	✗	✓	✓	✓	✓
Price tiers	✗	✓	✓	✓	✓
Quotes	✗	✓	✓	✓	✓
Bills of materials	✗	✓	✓	✓	✓
Multiple stock locations	✗	✗	✓	✓	✓
Warehouse management	✗	✗	✓	✓	✓
Stock alerts	✗	✗	✓	✓	✓
Landed cost tracking	✗	✗	✓	✓	✓
Serial & Batch Tracking	✗	✗	✗	✓	✓
Manufacturing	✗	✗	✗	✓	✓
B2B eCommerce	✗	✗	✗	✗	✓
Document designer	✗	✗	✗	✗	✓
Flexible reporting	✗	✗	✗	✗	✓
Advanced shipping	✗	✗	✗	✗	✓
Sales app	✗	✗	✗	✗	✓

Additional apps

	Chaser	Prospect CRM	Inventory Planner	Shopify	Unleashed Advanced Shipping	Unleashed BI Vision	Unleashed B2B Premium
Type	Debtor tracking	Customer relationship management	Sales forecasting	Ecommerce	Fulfillment	Business intelligence	Electronic Data Interchange
Onboarding and support	<ul style="list-style-type: none"> • Online help and resource centre • Email support 	<ul style="list-style-type: none"> • Online help and resource centre • Support portal • Video and webinar training 	<ul style="list-style-type: none"> • Online help and resource centre 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Support centre • Community forums 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Phone and live chat support (paid extra) • Community forums 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Phone and live chat support (paid extra) • Community forums 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Phone and live chat support (paid extra) • Community forums
Overview	<p>Cloud Credit Control software for Xero - designed for small-medium businesses, or Accountants and Bookkeepers with SMB clients</p> <p>"Automate your invoice chasing without losing the human touch"</p>	<p>Software for tracking leads and closing deals designed specifically for wholesalers, distributors and manufacturers</p> <p>"Stock-Aware CRM"</p>	<p>A planning tool for both e-commerce and brick and mortar sales with a number of useful metrics and reports to analyse your business</p> <p>"Puts you in charge of your inventory"</p>	<p>A leading multichannel ecommerce platform designed for small and medium-sized businesses</p> <p>"Build an online business—no matter what business you're in"</p>	<p>Fulfillment app for high-volume shippers. Processes shipments in 20 seconds</p> <p>"Increase efficiency and accuracy by automating your shipment processes directly from Unleashed"</p>	<p>Powerful data insights for Unleashed users</p> <p>"Drive successful decision making with actionable KPIs"</p>	<p>Customer self-service for quotes and ordering, based on your live inventory status. Customisable interface plus guest access/cash sales.</p> <p>"Give customers a seamless buying experience with a dedicated online ordering platform"</p>
More information	 Learn more about Chaser	 Learn more about Prospect CRM	 Learn more about Inventory Planner	 Learn more about Shopify	 Learn more about Unleashed Advanced Shipping	 Learn more about Unleashed Vision	 Learn more about Unleashed B2B Premium



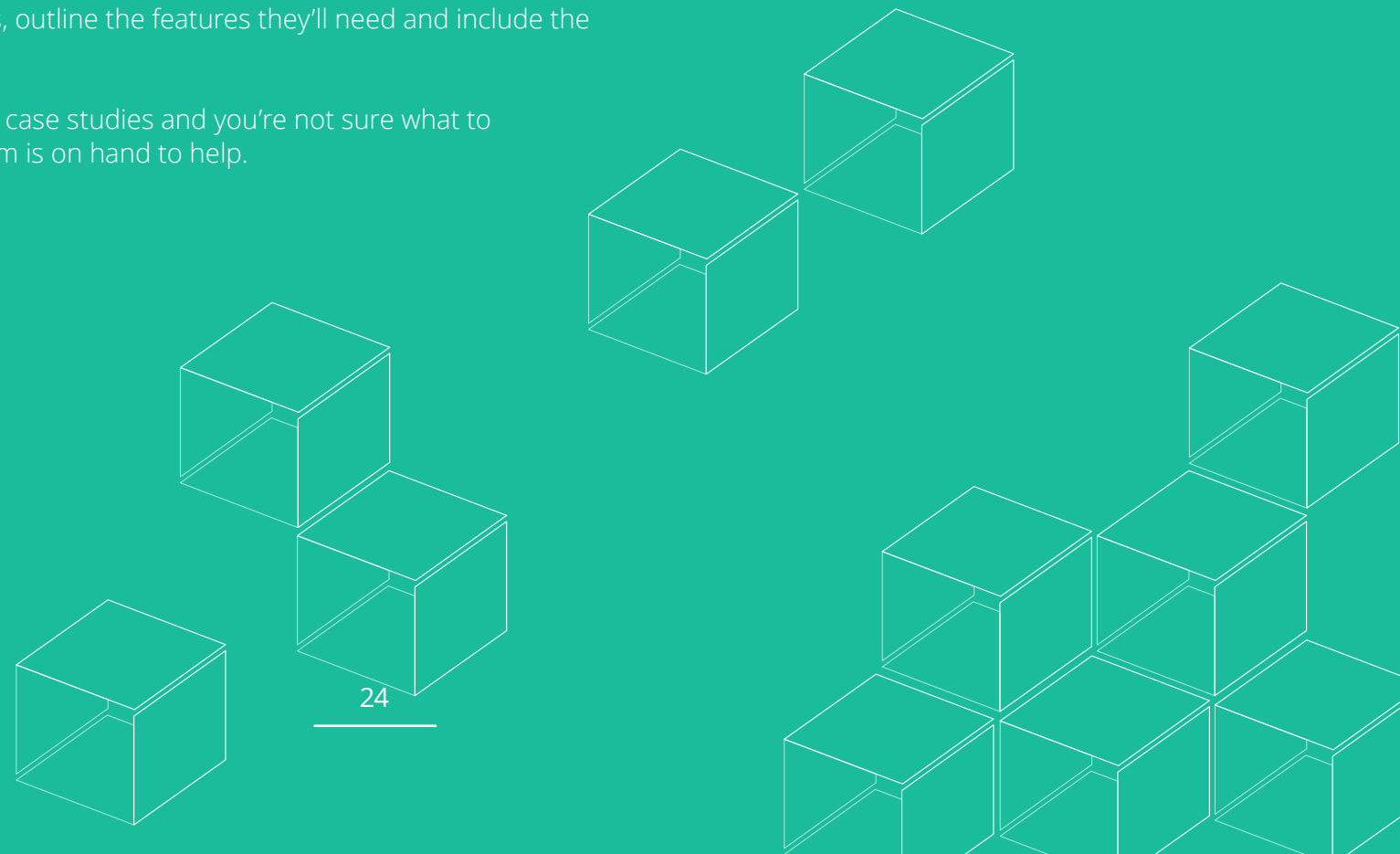
Cheat sheets

How to use the cheat sheets

These case studies will give you a rough guide on the help that your clients will need – whether they're large or small, make-to-order or make-to-stock.

We'll give you a brief overview of their business, outline the features they'll need and include the apps that we'd suggest.

If you have a client who doesn't fit any of these case studies and you're not sure what to recommend, then your Unleashed Partner Team is on hand to help.



Small make-to-stock business looking to scale

Maryam is the managing director at Galactic Pets, a firm that makes specialist pet food. Business is going well. Her turnover was £500k last year and she's expecting to hit £600k the next. Until now, she's been running her entire inventory and production on spreadsheets. She also does her books on Sage 50 Professional.

Maryam's main problem is that her inventory system doesn't link up to her accounts, making it difficult to prevent stock outs, schedule production or get an accurate current picture of the business at any given time. She also wants to add new apps to make her growing business more efficient – for ecommerce and shipping, for example – but she's concerned it's going to be difficult to integrate any new app with her existing systems and processes.



How to help Maryam achieve her goal:

By moving to the cloud Maryam can:

- Link key systems like accounts and inventory easily
- Add other new apps at any time with managed integrations
- Build the confidence that she can grow her business without technology holding her back

Why Xero for Maryam?

She'll get a flexible, always-up-to-date cloud based accounting system that will link easily with hundreds of other modern cloud based apps. She'll also improve her productivity by being able to access Xero from anywhere. And she can provide easy remote access to you (her accountant).

Why Unleashed for Maryam?

She can break free from spreadsheet-based working and enjoy a host of efficiency and productivity boosting features that will also enhance profitability – including warehouse management, automated stock alerts, and serial and batch tracking.

Why Unleashed Advanced Shipping for Maryam?

She can reduce the time and cost of managing shipments, integrating directly with couriers like DPD. Efficient logistics will be particularly important for Maryam as she scales.

Why Shopify for Maryam?

Shopify is packed with features that will enable her to connect to her website, design a great looking store and also link the store to her accounts.

How to get the ball rolling

Show your client how their problems can be overcome by sharing examples of similar businesses.

Try this case study:



ShinDigger Craft Beer

Recommended apps for Maryam

- **Xero** for accounts
- **Unleashed** for inventory
- **Unleashed Advanced Shipping** for efficient shipping
- **Unleashed BI Vision** for data insights
- **Shopify** for ecommerce

Large make-to-stock business seeking productivity gains

Ash has spent the last 15 years turning his passion for radio-controlled cars into a successful business. Now, with an enviable reputation for both quality and performance, and a global network of stockists, he's eyeing his next step.

Specifically, he has an opportunity via a trusted supplier to begin selling a range of RC drones – something he hasn't sold before – under his own brand. He knows this could launch him into a whole new level of business, but he's not prepared to make the required investment in marketing and sales without shoring up the performance of his core business beforehand. After all, Ash will be funding this move entirely off the back of his current RC car-making efforts, which means he'll need to grow his margins and improve efficiency if he wants a better cash position without growing his sales.

To top it off, Ash seems to spend most of his time micro-managing his increasingly complex operation. With six warehouses and dozens of suppliers, he spends hours each day simply keeping his operation running – something he knows he'll need to step away from if he's to focus on his new venture. Sensibly, Ash decides to get in touch with his trusted financial advisor (that's you) for some guidance.



How to help Ash achieve his goal:

Moving to the cloud will be critical if Ash is to lift productivity and grow margins without adding significant new capital. He will:

- Reduce the time he spends on production planning and stock management
- Reduce the amount of capital he has tied up in safety stock
- Use serial number tracking to manage his small but expensive componentry across his warehouses, reducing losses and avoiding production delays
- Zero in on the product lines, sales people and regions that add most to his margins

Why Xero for Ash?

Ash's CFO has been clamouring for a fully cloud-based cloud accounting system, and has already been researching the integrations he wants. By saving his CFO time he'll free him up to help with the new project.

Why Unleashed for Ash?

Inventory management and production planning have been major pain points for Ash. Unleashed will free up time, reduce waste, and give an accurate picture of the real costs of each product.

Why Inventory Planner for Ash?

While his core inventory needs will be met by Unleashed, an integration with Inventory Planner will give him the accurate sales forecasts he needs to get his products to the right place at the right time, and at the lowest cost.

Why Unleashed Advanced Shipping for Ash?

Ash takes pride in his efficient logistics staff, but he likes the idea of future proofing his systems for growth. With the Unleashed Advanced Shipping Module his warehouse staff will be able to process a shipment – including lodging the request with DPD and printing labels – in 20 seconds.

Why Unleashed BI Vision for Ash?

In order to continually seek out efficiencies and improved margins, Ash and his team need access to their data in an intuitive interface. Vision will be both cost-effective and game-changing.

How to get the ball rolling

Show your client how their problems can be overcome by sharing examples of similar businesses.

Try this case study:



Recommended apps for Ash

- **Xero** for accounts
- **Unleashed** for inventory
- **Inventory Planner** for sales forecasting
- **Unleashed Advanced Shipping** for efficient shipping
- **Unleashed BI Vision** for data insights

Small make-to-order business looking to scale

Fleur runs Fleur's Cakes, a small sweet-treats business in a bohemian part of town. She rents space in a commercial kitchen, has very low overheads in her tiny-but-trendy brick and mortar store, runs all her own marketing over Instagram, and takes orders over the phone.

Late last year, however, Fleur was featured in a popular magazine and her profile has taken off. She's now struggling to keep up with orders, and her friend has offered to open a second shop in a nearby city.

Fleur wants to pursue this sudden opportunity for growth, but she now needs to worry about how she'll manage her short-shelf-life ingredients, about launching a proper ecommerce store, how to get smarter about ordering from suppliers, and what price to offer cafes who want her slices in bulk.



How to help Fleur achieve her goals:

Fleur has very suddenly found herself in need of online tools that will allow her to manage her fledgling business on the go. Thankfully with just a handful of cloud apps Fleur can:

- Automatically generate Purchase Orders for ingredients in response to sales
- Integrate her accounting system with her new ecommerce store so that sales are automatically processed and recorded
- Batch track her fresh ingredients, and get smart about when to offer discounts that will move expiring stock
- Offer unique pricing to different cafe businesses and let them place orders through a B2B portal

Why Xero for Fleur?

Writing invoices on her laptop and manually filing tax returns become a thing of the past for Fleur (and her accountant) when she moves to Xero.

Why Unleashed for Fleur?

Running a business from spreadsheets is too time-consuming and error-prone to allow the growth that Fleur wants. Unleashed will integrate neatly with her first choice of accounting app (Xero), and let her manage her ingredients, suppliers, and customer orders all in one place. It also works elegantly with Shopify, which her web designer recommends.

Why Shopify for Fleur?

With an online ecommerce store connected to her inventory management and accounting apps, Fleur's potential for growth is now limited only by her (formidable) social media marketing skills.

How to get the ball rolling

Show your client how their problems can be overcome by sharing examples of similar businesses.

Try this case study:



Food manufacturer La Tortilleria puts inventory management at their core

Recommended apps for Fleur

- **Xero** for accounts
- **Unleashed** for inventory
- **Shopify** for ecommerce

Large make-to-order business seeking productivity gains

Steve is the managing director of LidarTech, which makes specialist geospatial engineering equipment for the surveying industry. His equipment ranges from aircraft-mounted laser scanners for terrain mapping within the mining sector, to GPS tracking buoys used by marine scientists.

Steve's business strategy is based on constant product innovation and refinement, and he has a dedicated team of engineers and product specialists. His manufacturing operation, however, is hindered by a legacy ERP – while his engineering team struggles to productise the constant stream of ideas coming from senior management, marketing, and customer feedback.

Altogether, he feels that too much time and energy goes into day-to-day operations and projects that go nowhere.



How to help Steve achieve his goals:

A best-of-breed cloud app coalition will help LidarTech by:

- Providing core business software that adapts and evolves as they do
- Supporting their innovation cycles with accurately costed assemblies
- Managing their high-value stock efficiently, with oversight of supplier leads times and accurate margins
- Delivering data insights that fuel strategic innovation

Why Xero for Steve?

Moving to a cloud accounting system gives Steve and his team a much needed refresh of their core accounting software, with minimal capital outlay.

Why Unleashed for Steve?

Linking LidarTech's innovation cycles with their inventory management and production software

becomes simple with Unleashed: as products are spec'd-up and prototyped they can be broken down into Bills of Materials and accurately costed, making life much easier for Steve's purchasing and production staff.

Why Unleashed BI Vision for Steve?

With live data insights fed directly from the manufacturing, sales and sourcing functions in Unleashed Steve is able to focus the company on the products that deliver the greatest margins. His reputation for quality and competitive pricing grows as he continually cuts costs and inefficiencies from his operation.

How to get the ball rolling

Show your client how their problems can be overcome by sharing examples of similar businesses.

Try this case study:



Recommended apps for Steve

- **Xero** for accounts
- **Unleashed** for inventory
- **Unleashed BI Vision** for data insights





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