



Solution Implementation Workshop Attendance

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Key Points & Lessons Learned

- When going through a solution implementation, **every** company will learn “insightful” information about their day to day operations and organization. Use this time to listen and document all opportunities for change and improvement. Finger-pointing is not an efficient use of time.
 - It is encouraged communicate this to all parties who participate in workshops.
- The list provided is a suggestion of departments or individuals to include in each functional workshop or meeting.
- Throughout workshops, document and take good notes. Identify who provided what information should you have follow up actions post meetings.
- Some workshops or meetings can potentially be combined into a single workshop to make efficient use of staff’s knowledge and time.

Representation By Departments	Kick off Meeting	RPL Screening	Embargo Screening	Classification Management	Integration - Item Master	Integration - Party / Location Master	Integration - Trade Transaction (TT)	TT Classification Screening	TT Country of Origin Screening	TT License, Permit or OGA Screening	TT Documentation Generation	Integration - TT Screening Results to ERP System	License / Permit Management	Company Registration Management	Other Government Agency Management	Export Self Filing (i.e. AES, CAED, SADD)	Import Self Filing (Customs Clearance)	EDI Feeds (In & Out)	Reporting	Document Repository (Supporting Documentation)	Letters of Credit	Business Monitor	User Access	Audit Trail Mgmt	Language Configuration	Other
	Contracts (Supplier, Mfg, Customer, etc.)	x	x																			x				
Client Project Manager	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
ERP Solution Prime	x						x					x						x								
Engineers - New Product Introduction	x			x					x				x		x			x		x						
GTC - Management or Prime by Country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
GTC - Classification	x			x	x			x		x			x						x			x				x
GTC - Imports	x	x	x	x	x	x		x		x	x	x	x		x		x		x	x	x	x	x	x	x	x
GTC - Exports	x	x	x	x	x	x		x		x	x	x	x		x				x	x	x	x	x	x	x	x
Integration / Solution Prime	x				x	x	x		x			x					x	x								
IT Project Configuration Team	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Item / Product Master Data Owners	x				x				x						x			x								
Legal	x	x	x											x		x	x				x					
Logistics / Warehouse	x										x	x				x		x		x	x	x	x			
Order Manager (Places Customer Orders)	x											x														
Party Master Data Owners	x	x	x			x												x								
Procurement (Booking PO)	x											x														
Freight Forwarder / 3PLs	x															x		x								
Client Solutions Architect	x						x				x	x				x	x	x	x	x				x	x	
Government Agency (i.e. Customs, etc.)																x	x									
Customs Broker	x																x	x								
Finance & Tax																	x		x		x					
Other	TBD																									

TBD

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