



## Operational Review Questionnaire

Plant Name – City, State

### Section B – Order Entry

Interviewer:

Date & Time:

Plant Representative Name:

Job Function:

Phone Number:

Email Address:

### Roster Details

1. How many people work in your department?
  
2. What shifts do they work?

### Data Entry and Review

3. Who in your department enters data into the ERP system?
  
4. What is the data entry process?
  - a. What is the process to turn an estimate into a live job?
  
  - b. How does Sales Order to Production entered into the ERP system?



c. Other?

5. Who reviews the data entered for accuracy?

a. What is the review process?

b. Who approves changes and variances?

c. What kind of changes do they make to the data?

### **Data Flow**

6. How many jobs do you open on average daily?

7. How long does each job take to open?

8. What documents/information do you receive?

9. What is the flow of data within your department?

10. What documents/information do you produce into other departments?  
(e.g. Job ticket, P.O., Paper Requisition)



11. What other department(s) are involved in your process?

### **Systems & Reports**

12. What systems are you using besides your ERP?
13. Do your other systems interact with your ERP? (Manually or interfaced?)
14. What reports does your department utilize?
15. What understanding does your department gain from those reports?

### **Miscellaneous**

16. What do you want to improve or change over the next 12 months?
17. What are your procedures for changes?
- a. Alts / Change Order
  - b. Change of Specification (Requires new estimate)



18. Who can create change orders?
19. What is your procedure for coordinating?
  - a. Production Events (Scheduling, Paper, Outside Services)
  - b. Customer Events (Press OK, Proofs)
20. What tools do you use to push jobs through?
  - a. Ink Draw-downs
  - b. Film Pulls
  - c. Outside Services
  - d. Shipping
  - e. Prepress
  - f. Scheduling
21. Is there anything additional you feel we should know or take into consideration?
  - a. Vital details we haven't inquired about?
  - b. Questions we should have asked?