Deployment Toolkit Overview

Version 1.0

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What is the toolkit?

The Deployment Toolkit provides the step-by-step instructions for deploying Logistimo in the context of your existing supply chain environment. The Toolkit breaks down deployment into 3 stages and guides you through the steps to be

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followed in each stage. In addition to serving as a process guide, the Toolkit provides reference documents and links that can be used during deployment.

With the help of the Toolkit, you will be able to:
- identify gaps in planning of a deployment
- access templates for capturing information
- explore reference articles, guidelines, and best practices for deployment

Figured out your project already? Jump straight to our [knowledge base](#) *to learn the product.*

What are the stages of deployment?

A deployment can be viewed as a project that goes through the stages of planning, executing and monitoring. The three stages are listed below:

Plan ➤ Deploy ➤ Monitor

When using the Toolkit for the first time in a deployment, we recommend understanding all the stages prior to executing them. A deployment checklist has been provided which can be printed and used as a checklist at different stages in the deployment.

Reference Document:
- ***Deployment checklist***

Plan

Assess existing supply chain structure and processes to identify features of Logistimo to adopt and to define the scope of deployment

Steps in the planning stage:
1. Identify deployment objectives
2. Study supply chain landscape
3. Define scope of deployment
4. Perform an infrastructure adequacy assessment
5. Prepare for the deployment

Identify deployment objectives

The first step in planning is to determine what the deployment seeks to achieve: *what are the end objectives; what does a successful deployment look like?*

With regard to supply chain objectives, most deployments primarily focus on achieving the objectives such as preventing stock outs, reducing material wastage, achieving sustainable cost & service levels, etc. Each of these objectives could further be defined as specific metrics.

Based on the sector, challenges and scale of your product usage, the supply chain objectives to be achieved may vary from the basic ones mentioned above

Study supply chain landscape

With a clear end-objective, the next step is to understand your existing supply chain landscape. Assessing your supply chain involves identifying the nature of the supply chain, the flow of materials, nodes in the supply chain and the infrastructure available at each of the nodes.

This study can be divided into two steps:
- Identifying the nature of your supply chain: Some sources such as **The Logistics Handbook** document or **MIT OpenCourseware courses** can be used to identify the nature of your supply chain
- Understanding the supply chain landscape: The *facility survey* document, listed in the appendix, can be used perform this study

Define scope of deployment

The objectives and supply chain study would need to be evaluated to determine the scope of the deployment. This is a crucial stage and would require all stakeholders to define a roadmap for the deployment.

Steps in the scoping stage are:
- Identifying the challenges noted in the study that directly affect the objective
- Mapping the supply chain to Logistimo's **product offerings**
- Finalizing the functions at different nodes that can be supported by Logistimo (managing inventory, managing orders/indents, monitoring temperature of materials, etc.)

Perform an infrastructure adequacy assessment

After defining the scope, an assessment of the current infrastructure needs to be performed against the requirements of minimum infrastructure required to adopt Logistimo.

An *infrastructure requirements* document, listed in the appendix, can be used for performing this assessment.

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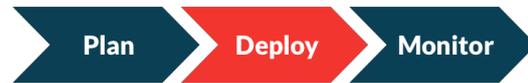
Prepare for the deployment

Based on the defined scope, a detailed deployment plan with tasks, budget, and resources has to be created. This should include:

- outlining the various activities associated with the deployment
- assigning timelines to each activity and allocating tasks
- allocating resources and costs to each stage under appropriate cost heads
- defining thresholds for each cost center and an approval matrix for expenditures above the threshold limits

The *Project Plan* document referenced at the end of this section provides an overview of typically performed tasks in a deployment. However, tasks and estimates can vary based on the nature and scale of your deployment.

Reference Documents:

- *P1. Facility survey*
- *P2. Infrastructure requirements*
- *P3. Project plan*

Deploy

Piece together metadata, enable configurations and go-live with the deployment

The deployment stage is where the project is implemented and the tasks defined in the project plan are put into action.

Steps in the deployment stage are:

1. Gather metadata
2. Procure hardware
3. Allocate human resources
4. Configure Logistimo
5. Build a support system
6. Train users

Gather metadata

At this point, information related to the supply chain would have been gathered as a part of the study. However, detailed data per node in the supply chain will need to be gathered and this metadata can be broadly divided into:

- Materials: Stock Keeping Unit (SKU) data such as name, type, nature of materials, etc.

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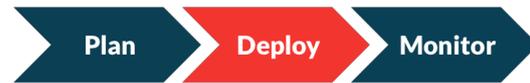
- **Entities: Facility data such as name, type, location, supply chain relationship with other entities, reporting hierarchies, materials managed, etc.**
- **Users: Contact data of entity & supervisory users, descriptions of their roles and reporting relationships**
- **Assets: Equipment data that stores these materials, such as type of equipment, capacity, temperature range in which they are maintained, etc.**

The *five metadata collection templates* , listed in the appendix, can be used to collect this data.

Procure Hardware

Based on the gaps identified during the infrastructure adequacy assessment, the required hardware will need to be procured. The procurement might be related to electronic hardware or SIM hardware, as listed in the *Infrastructure requirements* document.

A record of all the hardware that is deployed on the field should be documented along with adequate sign-offs from the responsible parties.

The *Hardware acknowledgement form* document**, listed in the appendix,** can be used during handover of hardware.

Allocate human resources

Based on the scope, specific roles & responsibilities have to be defined before deployment. This might include a wide range of resources including entity managers, supervisory staff, training staff, support staff, deployment managers, etc. The personnel for these functions may be available within the organization or additional workforce may be needed. The steps in the process are:

- **The task & resource mapping in the *project plan* can be used to identify specific roles & responsibilities**
- **Assessing internal human resource to understand adequacy of skills to perform these roles**
- **Hiring the necessary staff, if the available resources are inadequate**

Configure Logistimo

The design & function of users in a supply chain will need to configured onto the application. Different design decisions will need to be made broadly based on:

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- **Supply Chain functions per echelon: The structure & functions of a domain depends on the scale and nature of operations, the modules adopted, and the type of data required at each level in the operating framework.**
- **Notifications: Notifications, which can be instantly enabled or disabled in real-time, allow periodic alerts, updates, or any ad-hoc communication to be sent to users.**

The instructions to configure the Logistimo application can be found in the Configuration section of the *Logistimo Knowledge Base*.

Once the domains are created and configured, metadata collected during the planning stage will need to be updated onto Logistimo. The instructions to setup metadata on the Logistimo application can be found in Setup section of the *Logistimo Knowledge Base*

Train users

The final piece before the deployment can go live is training users on using the product and following the processes.

Setting up a training process includes the following steps:
- **Defining a training framework which accounts for the number of trainings needed, the nature of training, curriculum, and exercises for each training**
- **Setting up a training domain**
- **Creating training documentation**
- **Collecting training feedback**

A *training kit (training requirement checklist, minimum quorum letter, training curriculum, guide to installing Logistimo & training feedback form)*, listed in the appendix, has been provided that includes reference documents at this stage.

Reference Documents:
- ***D1. Metadata collection templates***
- ***P2. Infrastructure requirements***
- ***D2.** Hardware acknowledgement form*
- ***D3. Guidelines for setting up a support structure***
- ***D4. Training Kit***
- ***Logistimo Knowledge Base***

Monitor

Post-deployment, metrics are monitored in a bid to constantly improve usage and enable greater impact

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This is an-ongoing process and would broadly involve:

1. **Track progress**
2. **Take improvement measures**

Track progress

Monitoring can be broadly divided into the following:

- **Ensuring adoption status of users: the primary objective is to ensure that users are using the product**
- **Improving data quality of the data collected: the quality of the data being entered into the application should be monitored in accordance with the Standard Operating Procedures (SOPs).**
- **Analyzing supply chain performance: The progress of the deployment in line with the objectives**
- **Understand user feedback: This can be periodically assessed based on queries and improvements received via the support platform**

Take improvement measures

Based on the progress in each of these stages, measures will need to be taken to improve them. This might include basic measures such as:

- **Conducting refresher trainings**
- **Updating the system with latest metadata**
- **Addressing specific challenges faced**

A *monitoring supply chain metrics* document, listed in the appendix, can be used.

Reference Documents:
- *M1. Monitoring supply chain metrics*

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Appendix

This lists all the reference documents mentioned across different stages and are available for easy download

- **Deployment checklist**
- **P1. Facility survey**
- **P2. Infrastructure requirements**
- **P3. Project plan**
- **D1. Metadata collection templates**
  - **D1-a. Entities & Users metadata collection template**
  - **D1-b. Material metadata collection template**
  - **D1-c. Inventory metadata collection template**
  - **D1-d. Asset metadata collection template**
  - **D1-e. Supervisors metadata collection template**
- **D2. Hardware acknowledgement form**

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- **Logistimo Knowledge Base**
- **D3. Guidelines for setting up a support structure**
- **D4. Training Kit**
  - **D4-a. Minimum quorum letter**
  - **D4-b. Training curriculum**
  - **D4-c. Guide to installing Logistimo**
  - **D4-d. Training requirement checklist**
  - **D4-e. Training feedback form**
- **M1. Monitoring supply chain metrics**

Did you find this document helpful? Would you have added any additional information?

If yes, please drop your feedback at support@logistimo.com

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