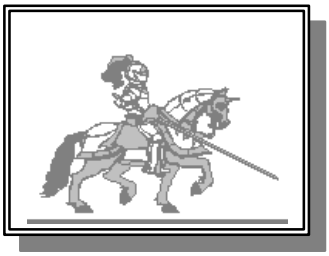
HORIZONS INTERNATIONAL
QUALITY ESSENTIALS SUITE



Quality Management Needs Analysis

In keeping with the methods of the quality body of knowledge we have prepared this document in an effort to obtain consistent and common information for use in evaluating the likely fit of our software products to your operational needs and to more easily identify opportunities to reduce cost of quality. Using this format to structure our inquiry and discovery process ensures a consistency of evaluation across multiple organizations and applications.

Thank you for participating in this process.

Instructions
Please tab between (or print out and write in) the following fields, filling in the appropriate areas with keyboard entries. Check boxes can be ticked via mouse or the space bar. Please skip sections that are not relevant to this inquiry.

Date:_____

Company Information

1. Company Name:			
2. Mailing Address:			
3. City:	4. State:	5. ZIP:	6. Country:
7. Phone: - - - extension		8. FAX: - -	
9. E-mail:		10. WEB address:	
11. Contact:			
12: Partner or Consulting Organization (if relevant)			
13: Contact:			

Please be sure that organization web site is included with all submitted forms. This provides our team with the ability to obtain a more complete idea of your likely business processes and related quality needs.

14. Who is (are) the decision maker (s) on this project?

Name Title/ Business Function

15. Annual Sales : _____ million 16. How long in business: _____

17. How many distinct physical operating locations; _____

18. Which of the following most closely represents your core business?

Food Processing ☐ Chemicals ☐ Equipment/Instrumentation ☐

Pharmaceutical ☐ Medical Devices ☐

High Tech Materials (e.g. polymers, reagents) ☐ Paper Converting ☐

Injection Molding ☐ Extruding ☐ Personal Care Products ☐

Electronics ☐ Services ☐ Maintenance and Repair ☐ Health Care ☐

Laboratory Testing Services ☐ Metal Fabrication ☐

Other (please define)_____

Quality Control/Regulatory Compliance

19. What are the current tools employed for quality management and control? (Select all that apply)

Integrated System ☐ Spread Sheets ☐ Manual ☐ Stand Alone ☐

20. If Integrated or Stand Alone is selected please share the software product names?

21. Is there a need to integrate any specific legacy systems to the Quality Management products? Please provide a list of relevant applications.

22. Please identify the places in your business processes where quality tasks are currently mandated?

Receiving ☐ Shipping ☐ Returned Materials ☐

Vendor Qualification ☐ Quarantine ☐ Production/Shop Floor ☐

Customer Service ☐ Product Development ☐ _____ ☐

_____ ☐

23. How many simultaneous system users do you anticipate in the quality area?

Transactional Inquiry or Reporting only

24. Do you currently perform on site analysis of materials for conformance or reporting purposes?

Yes ☐ No ☐

25. Do you currently collect samples and transport them to outside locations for analysis?

Yes ☐ No ☐

26. If Yes to above what is the lead time for return of data? _____ Working days

27. Do you currently have instrumentation or equipment that generates quality data?

28. If yes to above please describe that equipment and purpose.

29. Do you have formal Root Cause analysis processes? Yes ☐ No

30. Is your current lead time for completing root cause analysis acceptable?

Yes ☐ No

31. Does root cause analysis result in tracked corrective or preventative actions within an acceptable time frame?

Yes ☐ No

32. Do you have a formal process for confirming completion of corrective or preventative actions?

Yes ☐ No

33. What is the average monthly volume of out of compliance events reported?

_____

34. Please identify if the features below are a current, required or future need to support your manufacturing organization.

Feature:	Current	Required	Future
Received Materials Inspection for some or all products.	☐	☐	☐
Provide Certificate of Analysis or other documents demonstrating quality control to customers.	☐	☐	☐
Certificate Layout Varies by Customer or Customer/Item	☐	☐	☐
Automated Non-Conformance Management system.	☐	☐	☐
Paper/Excel based non-conformance management system.	☐	☐	☐
Formal defect analysis process for returned or defective items.	☐	☐	☐
Vendor scorecard or other formal vendor evaluation or qualification processes.	☐	☐	☐
Automate data collection for quality control in production process.	☐	☐	☐
Statistical Process Control.	☐	☐	☐
Transcribe paper based records to excel or other tools for analysis	☐	☐	☐
Formal processes for pursuing root cause analysis	☐	☐	☐

Automated instrumentation or equipment requires download to centralized database	☐	☐	☐

General Business Information

35. Please describe the primary products or services provided by your organization.

36. Please provide an overview description of the flow of your current quality control processes. It is helpful if any industry specific requirements or language can be included in this response.

37. If your industry currently, or in the future requires specific functionality or tools related to government or professional regulations, please identify those requirements. If you are currently certified for ISO or other professional standings it is helpful if they are included. Some common requirements are CFR 21 part 11, serial/lot control, version control of part numbers etc.

Current Situation

38. Why is software in support of the quality function being considered at this time? Some typical responses include:

Our technology platform is out of date and not responsive enough. We require additional transparency between business units for better decision making. We believe the right technology can provide a strategic benefit in our market place. We need to reduce costs by eliminating duplicate activities. We need to be able to make real time decisions. ‘

39. Please list the most important quality management issues that you would like to resolve.

-
-
-
-
-

40. If you have identified specific measurable benefits that you would like to achieve, please identify them. These could include reduce costs for storing and filing paperwork, automate vendor scorecard process for greater transparency. We would like to see these goals incorporated in your end of project evaluation benchmarks.

41. Please describe the evaluation and decision process that your team intends to utilize in pursuing the project of evaluating and procuring tools for your quality process. If possible please provide critical dates .

Basic Business Data

Customer Service/Sales Orders

42. How many orders will you write and process in a day?

43. Do you have specific quality requirements or specifications for all shipped products? Yes ☐ No ☐

44. Are quality specifications for products easy to access and provide to customers? Yes ☐ No ☐

45. Do you have formal inspection processes for Returned Materials? Yes ☐ No ☐

46. Do you have item / Customer defined quality specifications? Yes ☐ No ☐

47. Using a scale of 1 to 9, 1 being best, how would you rate the efficiency of your processes for setting up customer/item specifications for quality control purposes?

_____

48. Are the customer service/ sales team members empowered to easily authorize returns of defective products? Yes ☐ No ☐

49. Do your customers use a formal vendor approval or qualification process?
Yes ☐ No ☐

50. If yes, what % of your customers require you to participate in a formal qualification process? ____%

51. Are you required to recertify with your customers on a regularly scheduled cycle?
Yes ☐ No ☐

52. Do you have a dedicated team to support qualification processes?
Yes ☐ No ☐

53. Do you have a formal approach for responding to customer complaints or notices of non conformance?
Yes ☐ No ☐

Purchasing

54. Is there a formal vendor approval process? Yes ☐ No ☐

55. What % of your incoming products must be obtained from qualified vendors? ___%

56. What % of your incoming products requires full inspection before release to manufacturing? _____%

57. Do you have different item inspection processes based on the qualification status of the vendor or other similar factors? Yes ☐ No ☐

58. Is there a backlog of work for receiving inspection? Yes ☐ No ☐

Inventory

59. Do you currently have perpetual inventory? Yes ☐ No ☐

60. What is your inventory accuracy %?

61. How frequently do you execute physical inventories?

62. Please identify if the features below are currently part of your operating environment.

Feature:	Current
Serial/lot track materials in system (i.e. not paper based)	☐
Raw Material Inspection	☐
Raw Material Quarantine	☐
Lot Attribute Tracking	☐
Material Hold or Do Not Use	☐

Bar code scanning ☐

Cycle counting ☐

Bills of Materials/Formulas/Recipes (BOM) & Production Entry

63. Select the following terms that are generally used to describe the master records for BOMS or Recipes.

Bill of Material ☐
Formula ☐
Batch Ticket ☐
Master Production Record ☐
Recipe ☐
Intermediary ☐
Phantom ☐

47 How many BOMs/Recipes do you have?

64. What % of these BOMs/Recipes is active?

65. How many levels might be on a BOM/Recipe?

66. Do you utilize BOM/Recipe records to incorporate quality specifications in your processes and systems?

Yes ☐ No ☐

67. Do you utilize Work Centers or Operation records to incorporate quality specifications in your processes and systems?

Yes ☐ No ☐

Production Processes

68. Please identify where in your production processes quality inspection is required.

---

69. Are inspectors assigned to specific areas? Yes ☐ No ☐

70. Are employees responsible for inspecting quality into the product? Yes ☐ No ☐

71. Can any member of staff withhold defective products or processes when encountered?

Yes ☐ No ☐

72. Do you have specific forms for withholding or non conformance events?
Yes ☐ No ☐
(if yes please provide samples)

General Comments

73. How did your organization become aware of the Quality Essentials Suite?

Existing Microsoft Dynamics Users ☐

Previous Use of Microsoft Dynamics Products ☐

Technology Partner Recommendation ☐ Trade Show or Similar Event ☐

Direct Mail ☐ Web Search ☐ Advertising ☐

74. Will this be ☐ a new project ☐ extend an existing project.

If extending an existing ERP type solution please identify the manufacturing software that is currently in use.

_____

75. Please describe with % values the volume of production that applies in each category:

Make to Order	Make to Stock	Assemble to Order	Outsourced	Lean/Demand Flow

76. What is the SIC code or NAICS code for this organization?

77. Please define any strategic events that might be critical to an implementation time frame, e.g. seasonal sales patterns?

_____

_____

_____

Please feel free to address any comments, ideas, questions or concerns you may have.

_____

_____

_____