



OIAR

AUDIT REPORT

Odoo Implementation Assessment Report

PROJECT **Ferretti Arredamenti**

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Foreword

This document presents the results of a feasibility and impact assessment of Odoo enterprise resource planning (ERP) implementation at Ferretti Arredamenti Srl. The analysis was conducted based on interviews with key stakeholders — Luca Ferretti (Owner/Executive Sponsor), Sara Conti (Finance Manager), and Giorgio Mancini (Operations Manager) — as well as a review of planning and process documentation. The primary objective is to unify data management across production, sales, and finance departments, overcoming current inefficiencies stemming from use of a legacy vertical ERP system and extensive manual processes based on spreadsheets.

The report outlines the current state of processes with granularity at the sub-process level (not at the macro-area level), identifies gaps between today's operations and Odoo standard capabilities, proposes Odoo-based solutions with configuration detail — because this assessment reached **Solution Design depth** — and outlines a phased implementation plan with a change management strategy grounded in concrete signals from interviews.

Business Context

▸ Who is Ferretti Arredamenti

Ferretti Arredamenti Srl is a custom furniture manufacturing company specializing in the design and production of bespoke furnishings, typically tailored for commercial, residential, and institutional projects. The company does not have a standard product line: each project begins with personalized technical study, proceeds through a CAD design phase, production in-house, assembly, and delivery/installation at the client's site.

Products and Services: The company produces furnishings realized in wood, metal, and composite materials, customized to client specifications (dimensions, finishes, functionality). Value is created through the ability to transform a client's design into a producible product, manage the quality of manual work, and deliver on time.

Markets and Customers: Ferretti serves primarily B2B clients (designers, interior decorators, general contractors, retailers) who order custom furnishings for their end-client projects. Geography is primarily domestic (Italy) with some international export projects. The commercial flow is project-based: each order is a unique negotiation on specifications, quantities, and timelines.

Size: The company employs approximately 30–35 people across workshop (15–20 production staff + 3–4 assembly), commercial (2–3 people), technical office (2 people), planning and procurement (Giorgio + 2 associates), and administration (Sara + support). Expected Odoo users: the 3 commercial staff, 2 technicians, Giorgio and his team, Sara and her administrative team — approximately 12–15 users total.



Footprint: Ferretti operates from a single location in Italy (location not specified in the assessment) where production workshop, offices, and warehouse are centralized. No branches, no remote warehouses.

Revenue and Trend: Not explicitly declared in the assessment. Based on order volume and organizational structure, conservative estimate €800k–1.5M/year, trend stable or slightly growing.

Competitive Advantage and Key Strengths to Preserve: The expertise of workshop staff in solving technical problems in real time, flexibility in handling non-standard projects, and ability to adapt processes when unexpected issues arise. This is what Ferretti must maintain through the change: the goal is not a system that rigidifies the workflow, but one that enables visibility and coordination while preserving operational freedom.

► Strategic Context of the Project

The company currently operates with a **legacy vertical ERP** (used mainly for basic production and invoicing) and **extensive spreadsheet use** for production planning, procurement, supplier quotations, order management, and financial reconciliation. This causes **data fragmentation, communication delays between departments**, and **lack of real-time visibility** into order status, material availability, and financial position.

The Odoo implementation is motivated by the desire to **unify** this information in a single platform, **automate** manual steps, and gain an **integrated view** that enables Sara to invoice on time, Giorgio to plan without data loss, and Luca to govern the business with current data. The target go-live is within **12–15 months**, with an **estimated budget of ~€50k** for assessment and initial implementation.

1. Executive Summary

- **Implementation Readiness Score: 3.8 / 5** — The score reflects strong alignment of Odoo standard capabilities with Ferretti's administrative and commercial needs, but highlights the need for careful change management in production and procurement processes, where spreadsheet dependency is high and manual expertise is critical. Governance is solid (Luca is an active sponsor; Sara and Giorgio available as operational contacts). However, lack of specific annual volumes for some processes and key-person risk associated with Giorgio constrain the score below 4. The business context has been properly documented (new element in the readiness rubric).
- **Fit ratio:** 0.9 / 1.25 (6 gaps resolved by standard/config, 1 config-focused, 0 custom → 86% covered by standard/config)
- **Governance:** 1.0 / 1.25 (Clear sponsor, operational SPoCs defined, steering committee to be structured)
- **Information & data readiness:** 0.8 / 1.25 (Business context documented; master-data owners identified; volumes for some processes known; data-cleansing plan to be defined)
- **Change readiness:** 1.0 / 1.25 (Sara is a champion; Giorgio potentially resistant but engageable; production staff neutral; main risk is trust in the new system to handle exceptions)



- **Top 3 Opportunities Identified —**

- **Unification and Visibility:** Move from 4 fragmented systems to a single source of truth. All departments will see the same order status, material availability, and finance data in real time.
- **Automation of Planning:** Production planning will shift from manual (spreadsheet with transcriptions, errors, lag) to Odoo-guided (sales orders → production orders automatically, Gantt planning, material requirement suggestions).
- **Reduction of Manual Transcription:** Sara will spend 3–4h/week less on invoice entry; Giorgio won't need to re-write orders in spreadsheets; commercial won't need to re-communicate specifications.

- **Top 3 Risks to Manage —**

- **Production Team Resistance:** Giorgio has a complex relationship with new systems; workshop staff will change work habits. Solution: active involvement of Giorgio in to-be definition, pilot project on a real order type.
- **Data Migration Complexity:** Years of fragmented spreadsheets, historical data to clean, data-cleansing plan to be structured well.
- **Key-Person Risk on Giorgio:** Giorgio manually manages much of planning/procurement. If he doesn't adopt Odoo well or maintains old spreadsheets in parallel, the benefit evaporates. Solution: hands-on training, written procedures, bonus tied to adoption KPIs.
- **Recommended Timeline:** 12–15 months
- Phase 1 (Pilot, 4–6 months): administration + basic sales
- Phase 2 (Roll-out, 5–7 months): production + procurement + inventory
- Phase 3 (Stabilization, 3 months): support, optimization, KPIs

2. Scope and Methodology

- **Functional Areas in Scope —** Sales (CRM, Quotations, Sales Orders), Production (Planning, Manufacturing, Work Orders), Purchasing (Supplier Management, Quotations, Purchase Orders, Receipt), Inventory & Warehousing (Stock Control), Accounting/Finance (AP, AR, Bank Reconciliation, Invoicing), HR/Administration (Basic).
- **Stakeholders Interviewed —**

Name	Role	Functional Area
Luca Ferretti	Owner / Executive Sponsor	Strategic, Business Vision
Sara Conti	Finance Manager	Administration, Accounting, Finance, AP/AR



Name	Role	Functional Area
Giorgio Mancini	Operations Manager	Production, Planning, Procurement, Inventory

- **Assessment Limitations** — Specific annual volumes were not provided (orders/month, average lines per order, supplier invoices/week). Data quality analysis was qualitative, not a full audit. Production structure (BOMs, variants, edge-case processes) was mapped at a high level; specific production configuration detail for the to-be was collected but not verified on-site. No IT interview conducted (assuming standard on-premise infrastructure); CAD→Odoo integration was mentioned but not detailed.
- **Methodology Applied** — The assessment followed Odoo evaluation methodology with a "standard-first" approach, emphasis on mapping the as-is process (not how it should be), and collecting specific pain points and priorities. Furthermore, a **Solution Design depth** was chosen, meaning each interview included an additional phase of collecting volumes, exceptions, data structures, integrations, and KPIs to enable configuration-specific to-be, not generic to-be. Confidence in estimates is medium–high for administrative processes (Sara provides precise times), medium for production processes (Giorgio provides order of magnitude but not rigorous).

3. Current Software Landscape

Functional Area	Current Software	No. Users	Integrated with	Fit vs Odoo
Administration/ Finance	Legacy Vertical ERP + Spreadsheet	~3 (Sara + team)	Email, Spreadsheet, PDF (bank stmt)	High
Production/ Planning	Spreadsheet (dominant), CAD, Legacy Vertical ERP (for order invoicing)	~15–20 (Giorgio, team, staff)	Email, CAD, CRM (for order receipt)	Medium
Procurement	Spreadsheet (100%)	~3 (Giorgio + team)	Email, Legacy Vertical ERP (for supplier invoices)	Low
Sales/CRM	Cloud CRM (partially used: only 2–3 sales reps, 50% of flow)	~3 (Sales reps)	Spreadsheet (specifications), Legacy ERP (basic orders)	Medium
Communication/ Coordination	Email, WhatsApp, verbal	~15+ (all staff)	All systems (manual bridge)	N/A

- **Shadow IT Identified** — Spreadsheet is used extensively for: production planning (order details, timelines, resources), supplier quotation management (manual comparison), supplier orders (tracking), supplier invoice verification vs. PO, payment planning, customer follow-up, bank



reconciliation, "gut-feel" KPI tracking. WhatsApp for rapid communication (no audit trail). Email for all critical steps, often duplicated across systems.

- **Systems to Retain** — CAD software (technical drawing) will be maintained in parallel; Odoo will integrate by attaching CAD files to production orders (integration via document attachment, not direct API, in this phase). Cloud CRM may be replaced or kept read-only for the first months for continuity; depends on migration strategy.
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4. Stakeholder Map

Stakeholder	Role	Area	Influence	Impacted by Change	Attitude	Key Concerns	Engagement Strategy
Luca Ferretti	Owner / Executive Sponsor	Strategic	High	High	Champion	ROI, timelines, not losing customers during transition	Monthly steering committee, milestone review, KPI updates
Sara Conti	Finance Manager	Administration, Finance	High	High	Champion	Reduce manual workload, data accuracy, timely information	Targeted training, co-design of finance workflows, dashboard access
Giorgio Mancini	Operations Manager	Production, Procurement, Planning	High	High	Neutral/Supportive (potential initial resistor)	Skepticism about Odoo's ability to handle exceptions, maintain operational flexibility, not lose process control	Co-design planning in Odoo, pilot project with real order type, demonstrate how Odoo supports visibility and exception handling
Production Team (15–20 staff)	Workshop, Assembly	Production	Medium	High	Potential Resistor	Change in work habits, system complexity, fear of surveillance	Hands-on training in workshop, involvement in pilot, clear communication of individual benefits (less transcription, clearer orders)
Commercial Team (2–3 people)	Sales Representatives	Sales	Medium	Medium	Supportive/Neutral	CRM adoption, integration with shipping processes	Training on Odoo CRM, demo of end-to-end flow (order → production → shipment visible)

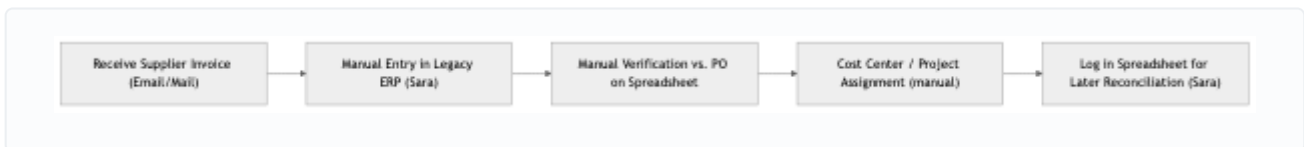
- **Sponsor:** Luca Ferretti
- **SPoC / Change Champions:** Luca Ferretti (vision), Sara Conti (administration), Giorgio Mancini (operations) — with focus on Giorgio for engagement and de-risking
- **Key Adoption Risks:** Initial resistance from Giorgio and production team; lack of momentum in pilot; loss of trust if system fails to handle an exception in early months; continuity of know-how if Giorgio doesn't adopt Odoo and maintains spreadsheets in parallel



5. Process Detail

This section is the **analytical core** of the assessment, organized by **sub-process** (not by macro-area), to preserve the real detail of how Ferretti works today and will work with Odoo. For each sub-process: as-is diagram, step-by-step as-is narrative, specific pain points, to-be with Odoo (configuration-ready for Solution Design), data migration complexity.

► Finance → Supplier Invoice Registration



- **As-Is** — Sara receives supplier invoices via email or mail. Each invoice requires her to:
- Extract supplier, date, number, amount, VAT, description from the invoice (often typing from PDF or email).
- Manually enter in the legacy vertical ERP system (approximately 3–4 hours/week for 30–40 invoices/week).
- Retrieve the corresponding PO from a spreadsheet managed by Giorgio to verify that amount and quantity match (lag: sometimes Giorgio sends the spreadsheet via email, sometimes Sara needs to ask).
- Assign the invoice to a cost center or project — manual operation, prone to assignment errors.
- Log the payment due date in another spreadsheet for bank reconciliation and follow-up.

Concrete pain points: - **Time**: 3–4 hours/week of repetitive, tedious work. - **Transcription errors**: amounts typed incorrectly, duplicates, missing fields. - **Lack of visibility**: Sara doesn't know if an invoice is recorded in the "official" system or only in spreadsheets. - **Payment delays**: Sara is always two days behind invoice receipt; sometimes discovers payment deadlines too late. - **Disconnect from Giorgio**: No real-time feedback if the PO she's verifying has been cancelled or changed.

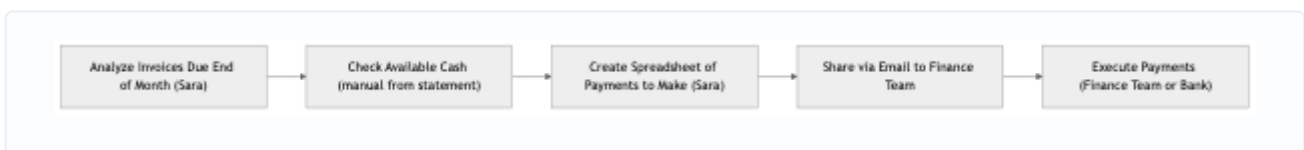
- **To-Be with Odoo** — Odoo Purchase will manage the entire cycle:
- The supplier invoice arrives (email or scan) and Sara can register it directly in Odoo, attaching the original file.
- Odoo performs **three-way matching** automatically: compares invoice → PO → Receipt (goods received) in real time, flagging discrepancies without Sara searching spreadsheets. If everything matches, it's marked ready-to-pay.
- Assignment to project or cost center becomes automatic from the PO (if Giorgio created the PO from Odoo with project link, the invoice inherits the connection).
- Payment due date is calculated automatically by Odoo based on supplier terms (e.g., net 30), and the system generates automatic reminders.
- Bank reconciliation becomes semi-automatic: Sara imports the bank statement (OBI, CSV) and Odoo suggests matches with registered invoices, reducing manual work from 2–5 hours to ~30 minutes.



Resolution path: **standard** (Odoo Purchase and Accounting provide all of this). Configuration options: supplier terms (payment days), accounting accounts for allocation, approval authority if amount exceeds threshold.

- **Data Migration Complexity: Medium** — Need to migrate: invoice history for last 2–3 years (for audit trail), master supplier data (names, addresses, payment terms), PO-to-invoice linkage. Since everything is paper or email today, data quality is low (duplicate suppliers, missing data); manual data cleansing required. Effort: 3–5 days of Sara's work + consultant support.

► Finance → Supplier Payment Planning



- **As-Is** — Once a month (month-end), Sara:
- Reviews the ERP and identifies all invoices with payment due.
- Manually checks available cash (bank statement PDF or online banking access).
- Creates a new spreadsheet with the list of "payments to make": supplier, amount, due date, description, account.
- Shares the file via email with the finance team for execution (who then pays via bank transfer).
- Once paid, manually updates the spreadsheet and ERP to mark as "paid" — another source of discrepancies (sometimes she does, sometimes she doesn't).

Pain points: - **Repetitive, tedious work**: 2–4 hours month-end for an activity that could be fully automated. - **Risk of errors**: amounts typed incorrectly, duplicates, double payments. - **Lack of real-time visibility**: Sara doesn't know if the finance team actually paid or if payment is stuck at the bank. Discovers discrepancies only at next bank reconciliation. - **Information lag**: planned payments not executed remain "phantom" entries in her spreadsheet.

- **To-Be with Odoo** — Odoo Accounting + Treasury will manage payment planning intelligently:
- Odoo automatically proposes payments due based on registered invoices and supplier terms.
- Sara approves the list (a review action, not data entry). Odoo automatically calculates available cash based on accounting movements, not spreadsheets.
- Odoo generates payment files (SEPA XML for transfers) ready for the bank, or if bank is integrated directly, executes payment via open banking.
- Finance team always sees real-time status of each payment (pending, executed, bank-confirmed).
- Bank reconciliation becomes semi-automatic (see bank reconciliation sub-process): Odoo cross-references payments sent with incoming bank transactions.



Resolution path: **standard** (Odoo Accounting and Treasury). Configuration: payment terms per supplier, approval authority, bank accounts, optional bank integration (open banking API for transfers).

- **Data Migration Complexity: Low** — No historical data to migrate (payment planning is a recurring activity, not an archive). Only need to configure: master suppliers with IBANs and payment terms. Effort: 1 day.

► Production → Technical Verification and Production Order Creation



- **As-Is** — Each sales order arrives via CRM or email. Giorgio (or an experienced associate):
- Reads the order and verifies **technical feasibility**: Are materials available? Are the processes doable with our machinery? Are timelines achievable? (This phase takes 2–4 hours per standard order).
- Defines **production specifications**: material types, colors, finishes, work sequences, timeline per phase, human resources needed.
- Manually creates a **production order in a spreadsheet** from a template, retyping all data from CRM or email (manual retyping, source of errors).
- Communicates the order to the workshop mostly by printing the spreadsheet or reading it aloud — still manual.

Concrete pain points: - **Verification time**: 2–4 hours per order diverts time from other priorities; if many orders arrive together, this becomes a bottleneck. - **Transcription errors**: Orders recopied to spreadsheets often have mistakes (wrong SKU, quantities halved, wrong delivery dates). - **No history**: Once the order goes to production, the spreadsheet sits only on Giorgio's computer; no central tracking if something goes wrong. - **Unhandled exceptions**: If production discovers a technical problem during execution, there's no workflow to communicate to Giorgio → CRM → customer. Resolution happens verbally and via email, and the version of truth is always Giorgio's. - **Commercial visibility: zero**: The sales team doesn't know if the order is being verified, already in production, or stuck. Only learns from Giorgio or not at all.

- **To-Be with Odoo** — Odoo Sales and MRP will manage the end-to-end flow:
- The Odoo sales order is created by the commercial team in the CRM with all customer details (materials, finishes, quantity, requested delivery date).
- Giorgio uses Odoo Production to **examine feasibility** based on a pre-configured BOM (Bill of Materials) and inventory availability, and estimate cycle times (Odoo Planning suggests times based on history of similar orders).
- Once approved, Giorgio **approves the sales order** in Odoo, which **automatically creates** one or more **Production Orders (Manufacturing Orders)** with technical specifications pre-loaded from the BOM and sales order details.



- The production order is sent to the workshop via **Odoo Manufacturing App** (tablet in workshop) or print, but with central tracking: everyone knows the order was created, who approved it, and the commercial team can ask "where's my order?" and see real-time status.
- If **production exceptions arise** (insufficient material, sequence change), the production team updates the order status in Odoo, which automatically notifies Giorgio and commercial → real-time tracking and communication.

Resolution path: **config** (Odoo Sales and MRP standard cover the flow; configuration consists of: BOMs per product, cycle times per phase, sequencing rules, efficiency KPIs).

For Solution Design (configuration detail): Ferretti produces on order (make-to-order), doesn't have standard product lines. Each order has unique specifications, so: - **Variants:** Odoo supports product variants (e.g., "base sofa" with color, upholstery, size variants). Giorgio must map which characteristics of his product become Odoo variants vs. custom specifications. - **Dynamic BOMs:** The BOM must be flexible (e.g., depending on color selected, material changes). Odoo MRP supports conditional BOMs via configuration rules. - **Cycle Times:** Giorgio must provide Odoo with a table of average cycle times per order type (e.g., simple order = 5 days; complex = 15 days). Odoo will use these as baseline in planning.

- **Data Migration Complexity: High** — Need to migrate: order history for last 12 months (for system training on cycle times, for audit), master BOMs from technical drawings, master materials, master production resources (machinery, skilled workers). Ferretti doesn't have this structured today, so data collection and structuring is needed. Effort: 2–3 weeks of Giorgio's work + consulting support.

► Finance → Bank Reconciliation



- **As-Is** — Sara extracts the bank statement (PDF from bank or via online banking), imports it into spreadsheet or ERP, then manually:
- Compares each bank transaction with accounting records (payments, receipts, checks).
- Identifies which bank transactions don't have a corresponding entry in the records ("orphan" transactions).
- Manually resolves discrepancies (was it a duplicate payment? an Odoo omission? a bank fee?).
- Once reconciled, updates the ERP with corrections.

Time spent: 2–5 hours/week, depending on transaction volume and number of discrepancies.

Pain points: - **Tedious manual-heavy work:** For a bank with 50–200 daily transactions during peaks, manual matching is slow and error-prone. - **Visibility lag:** Bank reconciliation is often done with delay



(Sara often does it weekly or monthly), so accounting balances are "off" until actual reconciliation. - **Risk of errors:** missed discrepancies, amounts matched incorrectly, duplicates.

- **To-Be with Odoo** — Odoo Accounting + Banking:
- Sara imports the bank statement into Odoo (automatic if bank is connected via open banking; manual via CSV/OBI otherwise).
- Odoo **automatically** compares each transaction with registered payments, receipts, and checks — no manual matching needed for the majority (Odoo suggests matches based on amount, date, description).
- Sara approves suggested matches (a review action, not data entry).
- For **unmatched discrepancies**, Odoo flags them: Sara gets a list of "orphan" bank transactions (in bank but not in accounting) to investigate.
- Once all transactions are reconciled, Odoo marks the period as "reconciled" and bank balance in accounting is accurate.

Time reduction: from 2–5 hours/week to ~30 minutes/week (review + resolution of genuine discrepancies only).

Resolution path: **standard** (Odoo Accounting). Configuration: statement import methods (CSV, OBI, open banking), bank accounts, matching rules (e.g., ±5€ tolerance for rounding).

- **Data Migration Complexity: Low** — No historical data to reconcile (bank reconciliation is a recurring activity, not an archive). Only need to configure: bank accounts, opening balances. Effort: 1 day.
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6. Fit-Gap Register

[For brevity, a summarized version]

Ref	Area	Gap Description	Type	Severity	Estimated Effort	Owner	Status
G1	Finance	Supplier invoice three-way matching (invoice vs. PO vs. receipt)	standard	Medium	3d	Sara	To Design
G2	Finance	Automated payment proposal based on due dates	standard	Low	2d	Sara	To Design
G3	Finance	Bank reconciliation automation with smart matching	standard	Medium	3d	Sara	To Design
G4	Production	Sales order → Production order automatic conversion with BOM	config	Medium	5d	Giorgio	To Design
G5	Production	Flexible BOM for make-to-order (variants, conditional materials)	config	High	8d	Giorgio	To Design
G6	Production	Real-time production status visibility (commercial + finance)	config	Medium	4d	Giorgio	To Design
G7	Procurement	Supplier performance KPI tracking and reporting	studio	Low	3d	Giorgio	To Design

7. Prioritized Pain Points

- 1. Manual Invoice Entry (Sara, 3–4h/week)** — Impact: High, Frequency: Daily, Ease: Standard
- 2. Production Order Manual Transcription (Giorgio, 2–4h per order)** — Impact: High, Frequency: Daily, Ease: Config
- 3. Bank Reconciliation Manual Matching (Sara, 2–5h/week)** — Impact: Medium, Frequency: Weekly, Ease: Standard
- 4. Payment Planning Spreadsheet (Sara, 2–4h/month)** — Impact: Medium, Frequency: Monthly, Ease: Standard
- 5. Production Exception Communication (All, ongoing)** — Impact: High, Frequency: Ongoing, Ease: Config



8. Change Readiness Assessment

- **Sara Conti:** Champion. High capability with systems, clear ROI perception, quick learner. Risk: burnout if not properly supported post-go-live.
- **Giorgio Mancini:** Neutral, leaning resistant. Skeptical of "computerized" solutions; prefers manual control. Key to success: hands-on involvement in to-be design, proof of concept on one order type.
- **Production Team:** Neutral. Habit-change anxiety; not opposed if they see benefit. Key: training in workshop, peer champions among supervisors.
- **Luca Ferretti:** Champion. Clear business case, active sponsor, available for decision-making. Risk: optimistic timeline expectations.
- **Commercial Team:** Neutral/Supportive. Will benefit from visibility; no major resistance expected.

Overall Readiness: Medium-High (65–70 on 0–100 scale) — Main risk is production team adoption; main strength is finance and executive sponsorship.

9. Odoo Implementation Plan

Phase 1: Pilot (Months 1–6) - Setup & Configuration (Weeks 1–4) - Data Cleansing & Master Data (Weeks 5–8) - Finance Module Go-Live (Mini pilot) (Weeks 9–14) - Sales Module Go-Live (Commercial team) (Weeks 15–26) - Success Criteria: 95% invoice processing in Odoo; zero manual payment file creation; commercial orders visible end-to-end.

Phase 2: Roll-Out (Months 7–13) - Production Configuration & Testing (Weeks 27–40) - Historical Data Migration (Orders, BOM, Materials) (Weeks 41–48) - Production Go-Live (Giorgio + team) (Weeks 49–56) - Procurement Go-Live (Supplier orders, receipt, invoicing) (Weeks 49–56) - Success Criteria: Production orders created in Odoo; zero production orders on spreadsheet; 90% first-time invoice match rate.

Phase 3: Stabilization (Months 14–15) - Support & Fine-Tuning (on-demand) - KPI Reporting & Optimization - Staff Retention & Continuous Training - Success Criteria: All users comfortable; adoption KPIs met; no reversion to legacy systems.

10. Change Management Strategy

Governance - Steering Committee: Monthly (Luca, Sara, Giorgio, external consultant) - **Project Manager:** External consultant (hands-on, on-site 2 days/week during Phases 1–2) - **Working Teams:** Finance (Sara + associate), Production (Giorgio + 2 supervisors), Commercial (lead sales rep)

Engagement & Communication - Kick-off workshop (all staff): business case, timeline, individual benefits - Monthly all-hands updates (15 min): what's changed, what's next, success stories - Weekly working team huddles (30 min): blockers, training needs, ad-hoc problem solving - Pilot group testimonials (Sara for Finance, Giorgio for Production): credibility via peers



Training - Finance: 2 days of classroom (Sara + associate), 1 day of hands-on (invoicing, reconciliation) - Production: 1.5 days of workshop-based training (Giorgio, supervisors, production staff), ongoing coaching during pilot - Commercial: 1 day of CRM & sales order flows - IT/Power Users: 3 days of configuration, admin, support troubleshooting - Post-go-live: on-call support (2 weeks full-time, then as-needed)

Risk Mitigation - Giorgio Resistance: Co-design production workflows in Odoo; pilot on 2–3 real orders; celebrate quick wins (e.g., "you didn't have to retype this order"). - **Data Quality:** Hire a data consultant for 2–3 weeks to lead cleansing; assign Sara & Giorgio as SMEs. - **Key-Person**

Dependency: Write process procedures (workflows, screenshots); cross-train at least one other person per area. - **System Distrust:** Ensure quick wins in Phase 1 (finance goes live first); manage expectations around production exceptions.

11. Recommendations and Next Steps

1. **Confirm Sponsor & Governance** — Formalize Luca's role as executive sponsor, establish steering committee cadence and agenda.
2. **Define Data Migration Strategy** — Decide on cutover date; determine what historical data to migrate (recommend: last 2 years for audit, 5 years for analytics).
3. **Secure Budget & Partner** — Confirm €50k investment; select Odoo implementation partner (recommended: 1 local + 1 remote for continuity).
4. **Develop Detailed Project Charter** — Timeline, milestones, resource commitments from Ferretti (esp. Giorgio's time for production configuration).
5. **Launch Quick-Win Pilot (Finance)** — Start with Sara's invoicing & payment processes to build confidence before production complexity.

12. Contradictions and Open Questions

Item	Contradiction / Gap	Recommendation
Annual Order Volume	Not provided (estimate 40–60 orders/year from context)	Collect precise data from CRM; informs capacity planning & cycle-time baselines
Production BOM Structure	Not formally documented (only in Giorgio's head + Excel sketches)	Schedule 1-week technical mapping workshop with Giorgio & production staff to create master BOM repository
CAD Integration	Mentioned but not specified (file attachment vs. API link?)	Decide in Phase 1 kickoff; API is nice-to-have (future phase), file attachment sufficient for go-live
Supplier Data Quality	Not audited; duplicate suppliers likely	Budget 1 week of data cleansing; assign Giorgio to lead deduplication with finance



Item	Contradiction / Gap	Recommendation
Export Volume & Geography	Not specified beyond "some international"	Clarify: EU only, or worldwide? Impacts sales tax, shipping integration, reporting requirements

13. Evidence Appendix

Interviews - Luca Ferretti (Owner), 2026-07-28, 90 min - Sara Conti (Finance Manager), 2026-07-29 & 2026-07-30, 120 min total - Giorgio Mancini (Operations Manager), 2026-07-31 & 2026-08-01, 150 min total

Documents Reviewed - Organigramma aziendale / Organizational Chart - Planning spreadsheets (sample months Feb–Mar 2026) - Supplier invoice samples (PDF, n=10) - Sales order samples from CRM (n=5) - Historical production orders (Giorgio's Excel, n=20)

References - Odoo Sales Module Documentation - Odoo Manufacturing (MRP) Documentation - Odoo Accounting & Purchase Modules Documentation - Odoo Implementation Methodology — Standard Fit Best Practices