Lumenia ERP HEADtoHEAD™

Demonstration Scripts

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ERPHEADtoHEAD Demo Scripts - Ireland 2026 - All Scripts

Lumenia Consulting Ireland (HQ)
Parkmore Business Park West
Galway, H91 PTT8, Ireland
+353 91 746940

Lumenia Consulting UK
167-169 Great Portland Street
5th Floor, London, W1W 5PF, UK
+44 203 8831 716

info@lumeniaconsulting.com
lumeniaconsulting.com
erpheadtohead.com

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1. Production

1.1 Brief Introduction to the ERP Product & Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author;
- The software partner/reseller (if relevant);
- The names and versions of the software products being demonstrated today (including third-party software if relevant);
- Key selling points for your system which are of specific relevance to manufacturers.

1.2 Production Planning & Scheduling

Demonstrate how the solution supports production planning and scheduling through to creation of active production orders. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Planning against actual and forecast demand;
- Capacity-aware scheduling (machine availability and capacity, material availability, labour/shifts);
- Monitoring actual production performance and throughput and re-scheduling accordingly;
- Use of AI and automation to support planning and scheduling.

1.3 Shop Floor Execution & Data Capture

Demonstrate an overview of production execution and visibility from an operator's perspective. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Viewing work lists and selection of tasks for execution;
- Capturing time and materials consumed;
- Prompts for, and capture of, quality inspection points;
- Recording output (quantities, lots, etc.) and scrap;
- Referring to drawings, work instructions and other operator supports;
- Use of barcodes, RFID tags and other connected factory technologies;
- Supervisor dashboards.

1.4 Overflow Time / Questions

2. Procurement

2.1 Brief Introduction to the ERP Product & Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author;
- The implementation partner/reseller (if relevant);
- The names and versions of the software products being demonstrated today (including third-party software if relevant);
- Key selling points for your system relating to procurement processes.

2.2 Purchase to Pay

Demonstrate how your solution simplifies the end-to-end procurement process. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Requisition creation with catalogue or free-text entry;
- Purchase approval workflows with mobile/email notifications;
- Budget checks and policy enforcement;
- Supplier selection and automated PO generation;
- Purchase invoice matching or approval for both inventory and non-inventory or service purchases.

2.3 Supplier Relationship Management & Compliance

Please provide an overview demonstration of functions and analytics in the system that can be used to support Supplier Relationship Management processes. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Supplier onboarding and qualification workflows;
- Supplier performance analysis;
- Supplier audit management;
- Maintenance of supplier accreditation and certification records;
- Risk alerts and compliance monitoring.

2.4 Additional Capabilities

Please highlight additional capabilities that your solution may provide to support procurement. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Spend control and strategic sourcing;
- AI-driven supplier recommendations;
- Sustainability and ethical sourcing;
- Portals for RFQs, supplier bid management or order collaboration.

2.5 Overflow Time / Questions

3. Finance

3.1 Brief Introduction to the ERP Product & Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author;
- The software partner/reseller (if relevant);
- The names and versions of the software products being demonstrated today (including third-party software if relevant);
- Key selling points for your system relating to finance processes.

3.2 Supporting & Optimising the Finance Function

Please demonstrate the core features and capabilities of your solution that enable the following:

- Automation of routine finance and accounting processes;
- Optimisation of period close processes;
- Compliance and audit readiness;
- Financial reporting and control;
- Analysis of financial transactions and their operational and commercial sources.

Where relevant, your demonstration should highlight how your solution is bringing AI-driven capabilities to the finance function and explain the benefits these capabilities can bring.

3.3 Financial Planning & Analysis

Please provide an overview of how your core ERP system supports financial planning and analysis including cash flow forecasting, financial budgeting and performance analysis and reporting.

Where relevant, your demonstration should highlight any advanced or AI-driven capabilities in this area and explain the benefits these capabilities can bring.

3.4 Overflow Time / Questions

4. Sales Opportunity to Quote

4.1 Brief Introduction to the Product & Vendor

Provide a brief introduction to the product and the vendor, covering:

- The software author;
- The software partner/reseller (if relevant);
- The names and versions of the software product(s) being demonstrated today (including 3rd party software if relevant);
- Key selling points for your system relating to sales and customer engagement processes.

4.2 Sales Opportunity Management

- Provide an overview of how your solution supports tracking of sales opportunities through a pipeline to quotation.
- Highlight how sales personnel can interact with sales opportunities on mobile devices when visiting customers.
- Show how customer and sales team interactions, such as emails and messages, can be automatically tracked to leads, opportunities or quotations.
- Highlight any advanced capabilities that AI is bringing to your opportunity management capabilities.

4.3 Sales Quotation & Configure-Price-Quote Capabilities

Provide an overview of the functionality provided by your solution to support the generation of sales quotations. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Creating, issuing and revising quotations;
- Using Configure-Price-Quote (CPQ) functionality to build dynamically priced opportunity-specific quotations;
- Converting sales quotations into sales orders.

4.4 Analysing Sales Performance

Briefly demonstrate the capabilities in your solution to analyse sales performance. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Pipeline analysis;
- Sales conversion analysis;
- Multi-dimensional sales performance analysis (e.g., analysis by region, division, product/service family, sales representative).

4.5 Overflow Time / Questions

5. Supply Chain Management

5.1 Brief Introduction to the ERP Product & Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author;
- The software partner/reseller (if relevant);
- The names and versions of the software products being demonstrated today (including third-party software if relevant);
- Key selling points for your system relating to supply chain planning.

5.2 Demand Forecasting & Planning

Demonstrate how your ERP system supports accurate, responsive planning across the supply chain. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Forecasting Tools:
  - Use of historical sales, seasonality, and external data (e.g., market trends);
  - AI/ML-generated forecasts with confidence intervals;
- Scenario Planning:
  - Simulate demand surges, supply disruptions or new product launches;
  - Visualise impact on inventory, operational capacity, and service levels;
- Sales & Operations Planning (S&OP):
  - Collaborative planning across sales, operations and finance;
  - Workflow for consensus building and plan approval.

5.3 Fulfilment Execution

Demonstrate how your ERP system ensures timely, cost-effective fulfilment. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Inventory Visibility:
  - Real-time view of stock across locations;
  - Alerts for low stock, excess or expiring inventory;
- Replenishment & Material Requirements Planning (MRP):
  - Automated reorder suggestions based on demand and lead times;
  - Support for min/max, minimum order quantity and just-in-time strategies;

- Logistics & Fulfilment:
  - Integration with carriers and 3PLs;
  - Pick/pack/ship workflows and tracking;
  - Customer notifications and delivery performance metrics.

5.4 Overflow Time / Questions

6. Project-Based Operations

6.1 Brief Introduction to the ERP Product & Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author;
- The software partner/reseller (if relevant);
- The names and versions of the software products being demonstrated today (including third-party software if relevant);
- Key selling points for your system which are of relevance to project-based operations.

6.2 Project Planning

Demonstrate how your ERP system supports structured project setup, planning and resource allocation, including the following:

- Project setup with linkage to project accounting and financial reporting;
- Budget assignment and breakdown into sub-projects or phases;
- Milestone creation and use as stage gates for approvals and billing;
- Resource assignment and availability checks;
- Gantt chart or timeline view for scheduling and dependencies.

6.3 Project Costing, Billing & Reporting

Demonstrate how your ERP system supports real-time project tracking, cost capture and client billing, including the following:

- Mobile time and expense entry by project team members;
- Assignment of goods and services to project cost centres;
- Periodic or milestone-based billing to clients;
- Project dashboards showing budget vs. actuals, earned value and profitability;
- Alerts for budget overruns or missed milestones.

6.4 Overflow Time / Questions

7. Human Capital Management (HCM)

7.1 Brief Introduction to the ERP Product & Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author;
- The software partner/reseller (if relevant);
- The names and versions of the software products being demonstrated today (including third-party software if relevant);
- Key selling points for your system relating to HCM processes.

7.2 Employee & Manager Self-Service

Demonstrate how your ERP system empowers employees and managers with intuitive tools. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Employee Portal:
    - View/update personal details;
    - Submit and track time-off requests;
    - Access payslips, benefits and training history;
- Manager Dashboard:
    - View team profiles and availability;
    - Approve leave, manage absences;
    - Initiate performance reviews or development plans;
- Mobile Access:
    - Demonstrate key workflows on a mobile device.

Where relevant, your demonstration should highlight how your solution is bringing AI-driven capabilities to the HR function and explain the benefits these capabilities can bring.

7.3 Managing Employee Performance & Development

Demonstrate how your solution supports continuous performance and career growth. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Goal setting and alignment;
- Performance monitoring and measurement;

- Periodic performance appraisals;
- Development planning (training, certification tracking and career progression);
- Recognition and rewards.

Where relevant, your demonstration should highlight how your solution is bringing AI-driven capabilities to the HR function and explain the benefits these capabilities can bring.

7.4 Optional Topics *(if time allows)*

- AI-driven employee attrition risk analysis;
- Sentiment analysis from surveys or feedback;
- Diversity and inclusion dashboards;
- Integration with external learning platforms (e.g., LinkedIn Learning).

7.5 Overflow Time / Questions

8. Business Intelligence & Analytics

8.1 Brief Introduction to the ERP Product & Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author;
- The software partner/reseller (if relevant);
- The names and versions of the software products being demonstrated today (including third-party software if relevant);
- Key selling points for your system relating to Business Intelligence (BI) and Analytics.

8.2 Operational BI for ERP Users

Provide an overview of the BI and Analytics tools available as standard either as part of or in addition to your ERP system. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Role-based BI: how the system can support "hands-on" ERP users by providing them with the information they need to do their jobs;
- Collaboration tools: how your system can support multiple users in sharing their data analysis and insights;
- Dashboards:
    - For "hands-on users";
    - For managers;
- Data analysis:
    - Exploring large data volumes;
    - Working with data from various sources.

8.3 Advanced Analytics

Demonstrate how your ERP solution supports forward-looking decision-making. You may choose to demonstrate any of the following suggested topics, based on what best showcases your solution:

- Predictive Analytics:
    - Forecast demand, cash flow, or inventory levels;
    - Use of historical trends and external data (e.g., weather, market indicators);

- Scenario Modelling:
    - "What-if" simulations (e.g., price changes, supply disruptions);
    - Visual comparison of outcomes;
- AI-Driven Insight:
    - Anomaly detection (e.g., unusual transactions or performance dips);
    - Automated recommendations (e.g., reorder points, staffing needs);
- External Data Integration:
    - Connecting to external sources (e.g., CRM, IoT, ESG platforms);
    - Blending internal and external data for richer insights.

8.4 Overflow Time / Questions