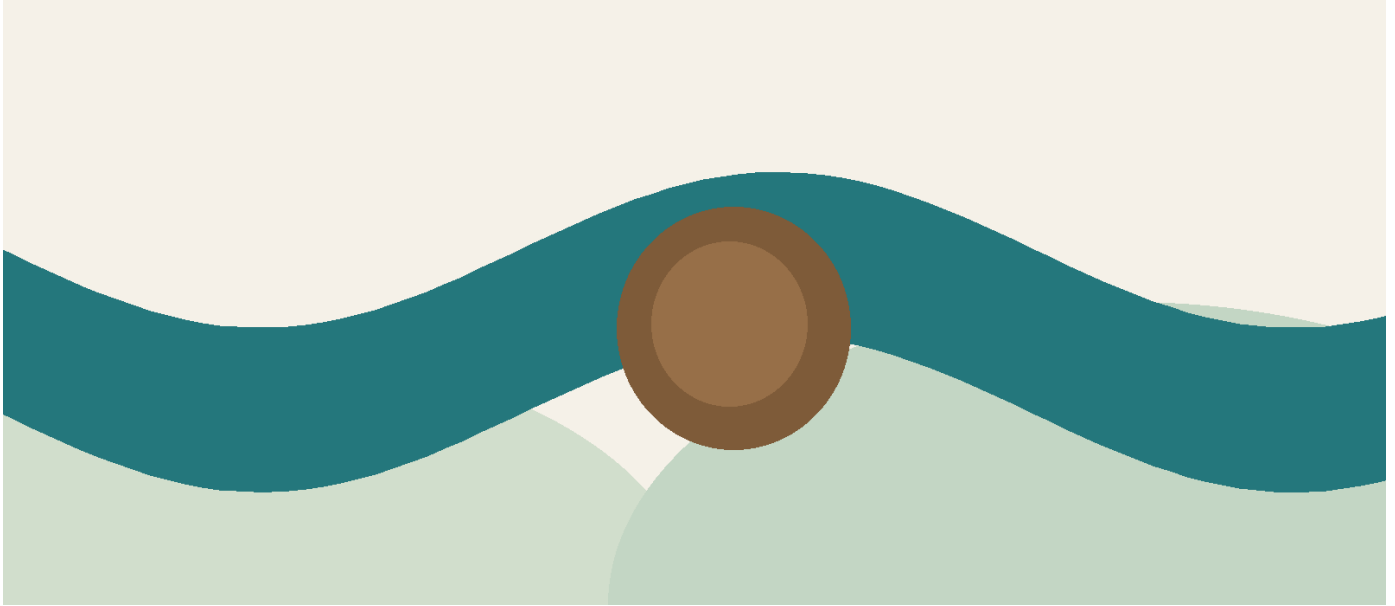


# QMETERY®

## VALUE CLOG DISCOVERY METHOD™



APPLICATION GUIDE 001

# EPICOR CLOUD READINESS

*Find Value Clogs. Unlock Value Flow.*

**MANIFESTO**

# Most ERP projects migrate software.

# Very few remove the conditions that prevent value from flowing.

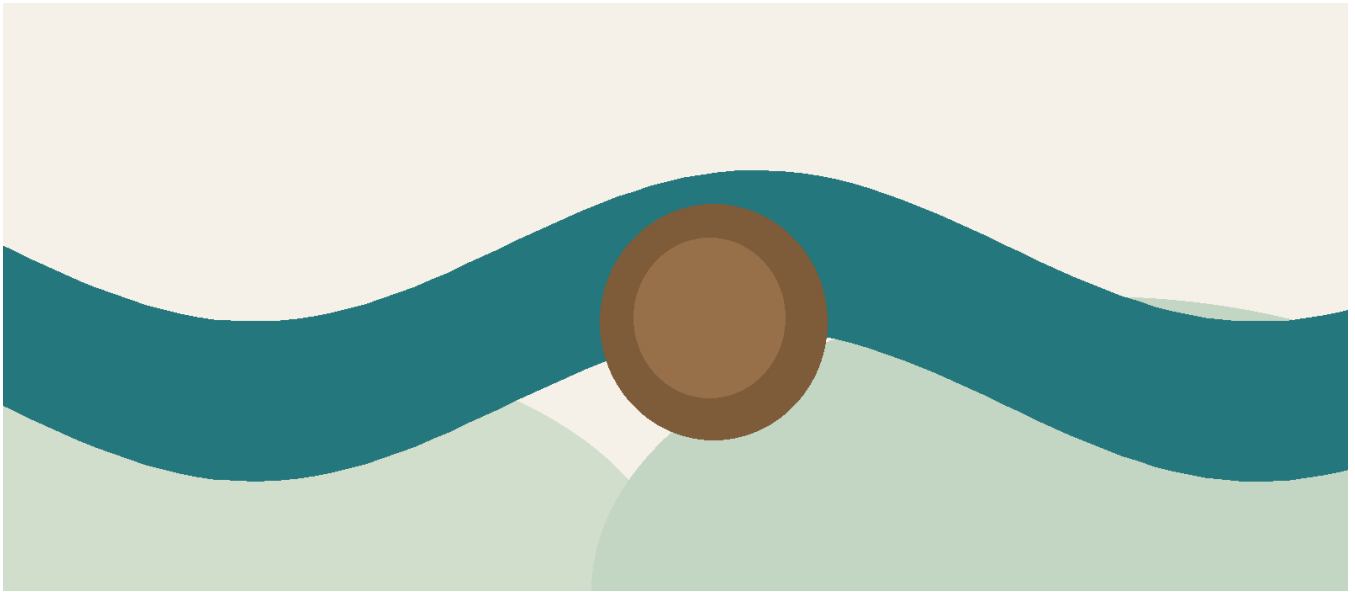
A migration may complete on time, pass technical testing, and still leave the business with the same delays, workarounds, weak master data, duplicate reports, and hidden dependencies it had before.

**THE QMETERY QUESTION**

- What must become easier, faster, safer, or more profitable after the move?

## THE CENTRAL IDEA

# Business value already wants to flow.



Demand becomes a plan. A plan becomes material. Material becomes production. Production becomes shipment. Shipment becomes cash. Every interruption between those points can become a Value Clog.

**DEFINITION**

# What is a Value Clog?

**A Value Clog is any condition that blocks the creation, protection, delivery, or conversion of business value.**

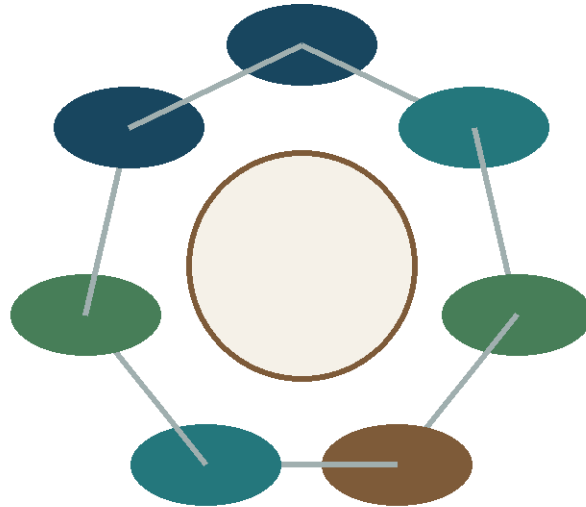
**COMMON FORMS**

- Waiting and manual approval
- Poor planning parameters
- Unreliable master data
- Undocumented customizations
- Interfaces nobody owns
- Repeated tickets and workarounds

A Value Clog is not merely a technical defect. It is a technical, process, data, or organizational condition with a measurable business consequence.

## THE METHOD

# The Value Clog Discovery Method™



## SEVEN MOVES

- Observe how work actually happens
- Discover where value slows or stops
- Quantify the business impact
- Prioritize by value, not noise
- Unlock with the smallest effective intervention
- Measure the value released
- Repeat as the system changes

## WHY NOW

# Epicor Cloud Readiness is a business decision.

Epicor announced that Kinetic 2028.1 is tentatively planned as the final on-premises feature release, with Active Support through December 31, 2029. This gives manufacturers a planning horizon - not a reason to rush blindly.

**READINESS IS NOT A DATE**

- It is clarity about processes, data, customizations, integrations, people, cost, risk, and expected value.

Source: Epicor, “Epicor Announces Schedule of Final On Premises Feature Releases,” January 6, 2026.

## PHASE 1

# Project Charter

The first Value Clog is often the project itself.

## FIVE QUESTIONS

- Why are we moving?
- Which business problems must disappear?
- Who owns the expected value?
- What is explicitly out of scope?
- How will we prove value after go-live?

## CHARTER VALUE CLOGS

- Technology-led scope
- No executive owner
- Benefits written as slogans
- Internal effort excluded from budget
- No decision rights

## PHASE 2

# Current State Discovery

You cannot remove a Value Clog you cannot see.



## DISCOVER

- Versions and environments
- Companies, plants, users, modules
- BPMs, BAQs, dashboards, reports
- UD fields, tables, code and SQL dependencies
- Manual spreadsheets and shadow processes
- Printers, labels, scanners and MES stations

The output is not only a system inventory. It is a Value Clog Register: what exists, why it exists, who depends on it, and what value is at risk if it fails.



## PHASE 3

# Manufacturing Process Flow

Every manual workaround is a clue.

## FOLLOW VALUE END TO END

- Demand and EDI
- Forecast and MRP
- Purchasing and supplier releases
- Job planning and scheduling
- MES and labor reporting
- Inventory, shipping and receiving
- Finance, quality and engineering

## ASK AT EACH HANDOFF

- What waits?
- What is re-entered?
- What requires a spreadsheet?
- What breaks under volume?
- What creates expediting, overtime, scrap, or delayed cash?

## PHASE 4

# Data Readiness

Dirty data creates invisible Value Clogs.

**Cloud does not clean bad planning logic.  
It only moves it.**

## DATA CLOGS TO FIND

- Duplicate or inactive parts
- Wrong lead times and planning parameters
- Invalid UOM relationships
- Unreliable supplier data
- Stale routings and revisions
- Negative inventory and unresolved transactions
- Open orders and jobs with no operational owner

## PHASE 5

# Integrations and Reports

Every undocumented interface is future risk.

## MAP THE CHAIN

- EDI partners and maps
- Shipping carriers and labels
- Finance, payroll, banking and tax
- MES devices and plant equipment
- APIs and external applications
- SSRS, Crystal, BAQ and Power BI outputs

For every interface, identify the business owner, technical owner, frequency, failure signal, recovery procedure, and financial consequence of interruption.

## PHASE 6

# Plant Floor Readiness

The cloud is remote. Production is physical.

**DO NOT FORGET**

- MES terminals and touchscreens
- Barcode scanners
- Label and document printers
- Network and wireless coverage
- Local files and device drivers
- Scales and equipment interfaces
- Shift-change support and fallback procedures

**VALUE CLOG EXAMPLE**

- Epicor is available, but a label printer cannot print. Shipping stops. The problem is local; the financial impact is enterprise-wide.

## PHASE 7

# Security and Control

Access should enable flow without weakening control.

**DISCOVER**

- Dormant and shared accounts
- Excess permissions
- Segregation-of-duties conflicts
- Unowned service accounts
- Weak approval paths
- Missing audit evidence
- Unclear support access

The objective is not simply tighter security. It is controlled Value Flow: the right user, performing the right action, with the right evidence, at the right time.

## PHASE 8

# Testing

Test the business, not only the software.

## END-TO-END PROOFS

- Demand to production
- Procure to receive
- Engineer to manufacture
- Order to ship to invoice
- Quality hold to disposition
- Month-end close
- Failure, recovery and rollback

## THE TEST QUESTION

- Can we receive, plan, build, report, ship, invoice, and close without creating a new Value Clog?

## PHASE 9

# Cutover

Protect Value Flow while the system changes.

## CONTROL POINTS

- Open orders, jobs, WIP and inventory
- EDI and interface freeze windows
- Data migration and reconciliation
- Printer and device readiness
- Go/no-go evidence
- Rollback criteria
- Operational communication by shift and site

A cutover task is complete only when evidence shows that value can continue to flow - not merely when a technical step is checked off.

## PHASE 10

# Stabilization

Every ticket tells a Value Clog story.

## HYPERCARE SIGNALS

- Production stopped
- Shipping or receiving blocked
- Repeated transaction errors
- Interface failures
- Slow performance
- Security and access failures
- Training gaps and recurring workarounds

Do not count only tickets closed. Track value restored, recurrence prevented, time to recovery, and the remaining Value Clog backlog.



## FIELD TOOL

# The Value Clog Register™

| Value Clog                        | Owner    | Value at Risk | Evidence             | Unlock Action                  |
|-----------------------------------|----------|---------------|----------------------|--------------------------------|
| Legacy BPM blocks Kinetic process | ERP      | High          | Failed test case     | Redesign                       |
| Manual MRP exception spreadsheet  | Planning | Medium        | Weekly rework        | Replace with governed workflow |
| Local label dependency            | Shipping | High          | Shipment stop        | Validate cloud-compatible path |
| Unknown SQL report                | Finance  | High          | Month-end dependency | Document and rebuild           |

The register turns migration risk into an owned management object. Each clog has evidence, economic relevance, a decision, and an owner.

## WORKED STORY

# The planner who never trusted MRP

Every morning, a planner exported suggestions into Excel, applied tribal rules, emailed buyers, and manually tracked exceptions. The process worked - until volume increased and the planner was absent.

## THE VISIBLE PROBLEM

- MRP output was “not trusted.”

## THE VALUE CLOG

- Bad planning parameters, undocumented decision rules, and no governed exception process created expediting, idle time, and dependence on one person.

## THE VALUE RELEASE

- Clean parameters
- Capture the decision rules
- Create exception ownership
- Retire the spreadsheet
- Measure schedule adherence, expedites, inventory and planner time

## FIELD TOOL

# The QMetry Readiness Score™

## SCORE EACH DIMENSION 1-5

- Charter and governance
- Process clarity
- Data quality
- Customization debt
- Integration ownership
- Plant-floor readiness
- Security and controls
- Testing depth
- Cutover evidence
- Stabilization capability

A low score is not a failure. It tells you where Value Clogs are concentrated and where readiness investment will release the most value.

# The objective is not to enter the cloud.



# The objective is to make value flow more clearly, reliably, and sustainably than it did before.

## THE QMETERY PRINCIPLE

- Find Value Clogs.
- Unlock Value Flow.
- Build Better Businesses.

# Notes and Sources

This guide is an independent QMETERY publication applying the Value Clog Discovery Method™ to Epicor Cloud Readiness.

## OFFICIAL EPICOR SOURCES

- Epicor Announces Schedule of Final On Premises Feature Releases, January 6, 2026.
- Epicor Kinetic product overview and cloud deployment pages.
- Epicor cloud migration and upgrades resources.

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