



The ERP Wake-Up Call Manufacturers Are Actually Heeding

Nick Avila & Antonio Munoz
August 12th, 2026

Housekeeping Items

- ALL ATTENDEES ARE MUTED TODAY TO MINIMIZE BACKGROUND NOISE.
- PLEASE USE THE CHAT FEATURE THROUGHOUT TODAY'S PROGRAM.
- THIS EVENT IS BEING RECORDED. A REPLAY WILL BE SENT TO REGISTRANTS IN A POST-EVENT EMAIL.
- FOR ANY POST-EVENT QUESTIONS, EMAIL SME MEMBERSHIP AT MEMBERSHIP@SME.ORG.



Agenda

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Why We're Having This Conversation

Manufacturing is becoming more complex. Customer expectations are higher, supply chains are changing, and growing businesses need better visibility across their operations.

Today's session will help you understand where ERP fits into that picture—and how to recognize when it's time to make the move.

- **Nick Avila, VP of Sales:** Brings deep expertise in ERP, supply chain, and manufacturing operations, helping businesses improve processes and efficiency.
- **Antonio Munoz, Solutions Engineer:** Specializes in optimizing ERP systems and designing scalable technology solutions that solve complex business challenges.

*ATIVO*ERP



Nick Avila
VP of Sales



Antonio Munoz
Solutions Engineer

Who We Are

We'll Meet You Where You Are



Vendor Neutral



Scalable Solutions



Guided Implementation



Ongoing Support

*ATIVO*ERP



Heritage ERP: Keep what works. We help keep your existing ERP running, supported, optimized, and aligned with business goals.

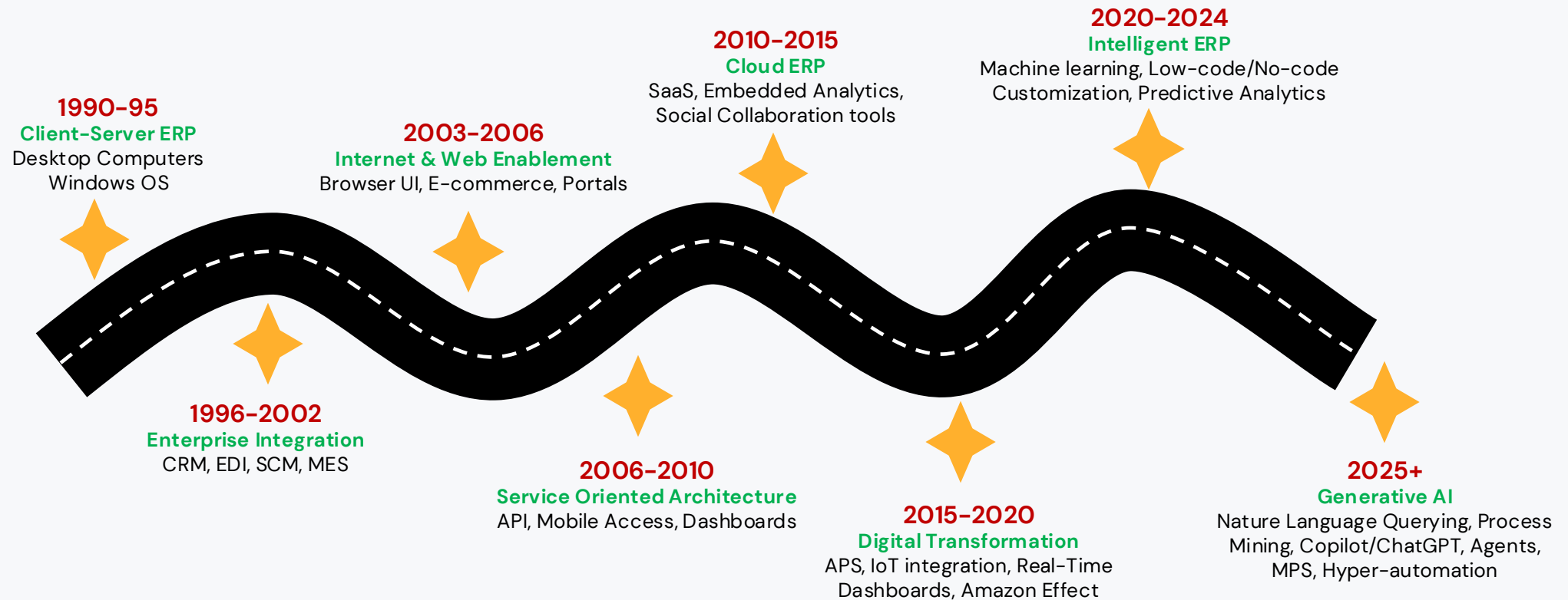


Modernization: Improve before you replace. Optimize processes and leverage AI, automation, and new technologies.



Future ERP: Transition when you are ready with guidance for selection, implementation, adoption, and optimization.

ERP Technology Roadmap



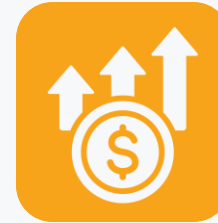
The Value of ERP

ERP value should be understood through four business outcomes.



Increases Customer Satisfaction

- Better project/order status communication.
- More reliable delivery execution.
- Stronger post-show return and storage visibility.



Increases Revenue

- Faster quote-to-project cycle.
- Better pipeline visibility.
- More scalable repeat work, better costing, and optimized operations.



Reduces Risk

- Fewer manual handoffs.
- Stronger approval and revision control.
- Better visibility into operational risk.



Increases Profit

- Better margin visibility.
- Reduced rework and duplicate entry.
- Improved labor, material, and freight cost tracking.

Legacy ERP vs Modern ERP

LEGACY



Single Point of Truth



Financial Statements



Record Business Transactions



Static Reports & Workflows



Manufacturing & Distribution Focus

Legacy ERP systems were designed to optimize internal processes and operational efficiency within the four walls of the organization.

MODERN



Interact with Customers



Communicate with External Partners



Proactive/Reactive Workflow



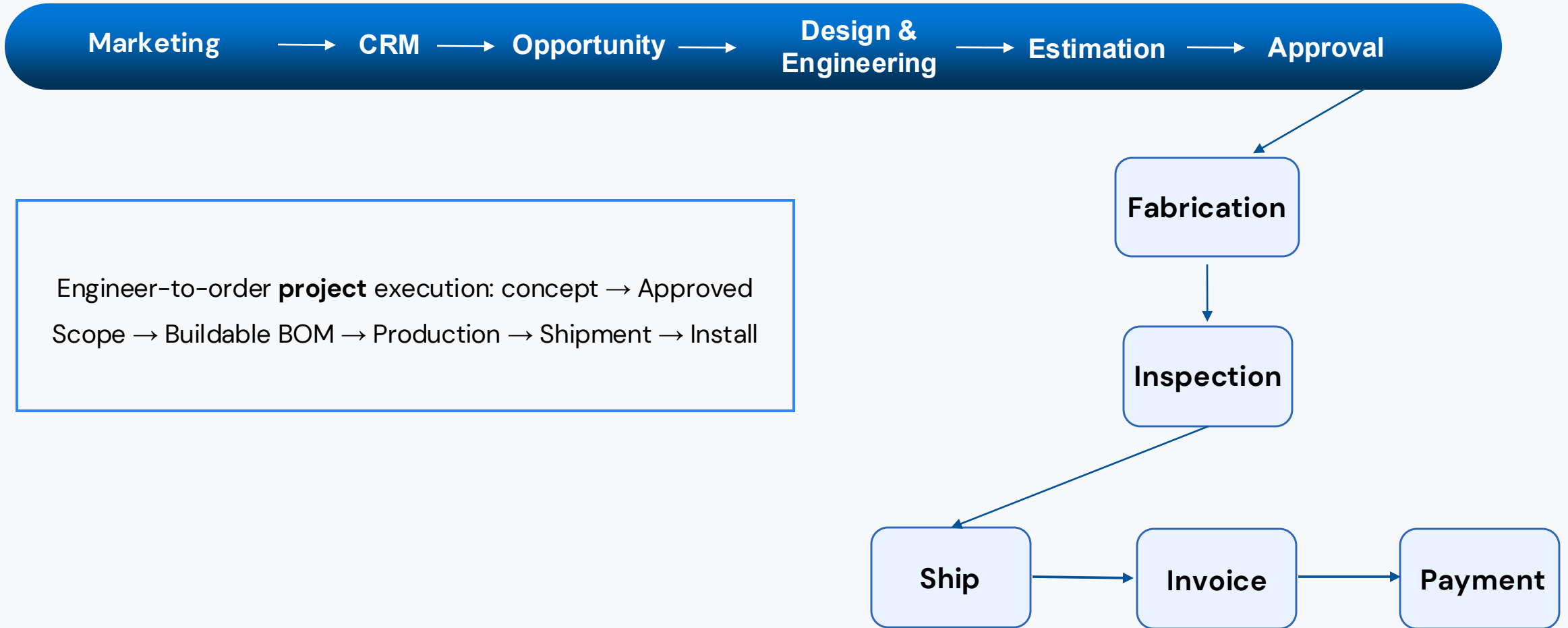
Predictive AI Tools



No Code/Low Code Configuration

Designed for the connected enterprise, modern ERPs facilitate real-time collaboration and information sharing with customers, vendors, and external partners

ETO/CTO Process Flow



Project / Job Costing

Custom work requires project-level cost visibility across the full build and delivery lifecycle.



Materials



Warehouse Handling



Labor



Refurbishment



Subcontracting



Rework / Changes



Freight



Management Outcome

- Protect margin earlier.
- Learn from completed jobs.
- Make better pricing decisions.
- Reduce surprises at closeout.

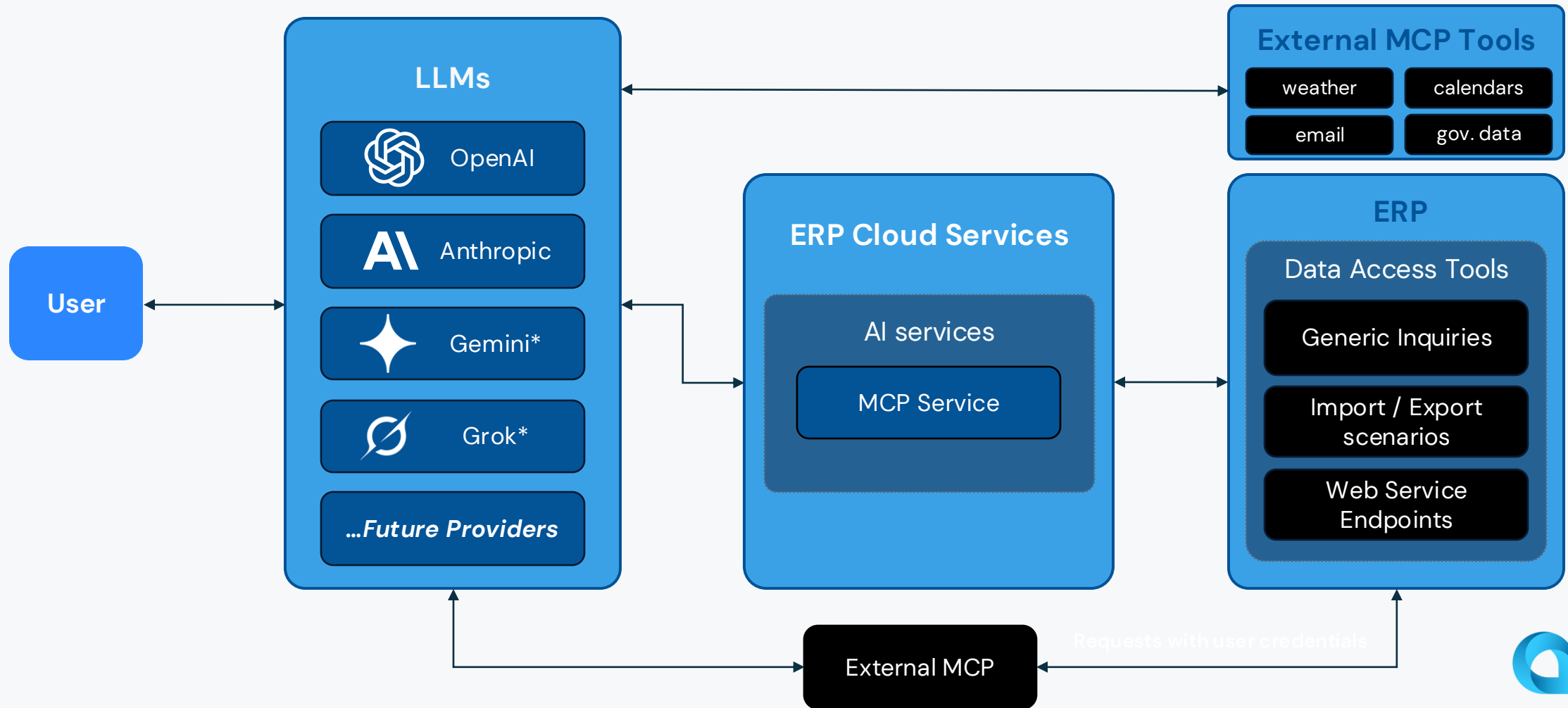


Reporting Goals

- Estimated cost vs actual cost.
- Budgeted margin vs actual margin.
- Profitability by customer and project.
- Visibility into overruns before the job is complete

MCP Service Architecture (Example)

Using ERP data while working inside AI



Thank You for Joining!



LEARN. GROW. ADVANCE.



Learn More



ERP Fit & Readiness Checklist



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Register Now

Sept 9: AI Reinvented ERP
Migration and Implementation
(Here's How)



Questions for Nick & Antonio?

Please share your questions
in the chat.

Want exclusive discounts
and benefits?

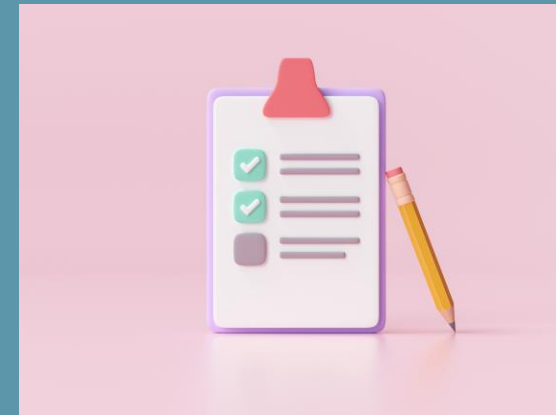
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with us - link is in the chat!



Thank you for tuning in for this
program.