The background features a dark blue field with a pattern of lighter blue dots that form a perspective view of a tunnel or a series of concentric, slightly offset circles that recede into the distance, creating a strong sense of depth and movement.

ERP implementation for small  
and midsize businesses:

# Steps to Success

An end-to-end guide to implementing  
an ERP system successfully.

[aclaros.com](http://aclaros.com)

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REALIZE THE POTENTIAL

## What to expect from this guide.

Understand the key phases of an implementation project

Discover best practices for everything related to change management and training

How to best adapt to new business processes

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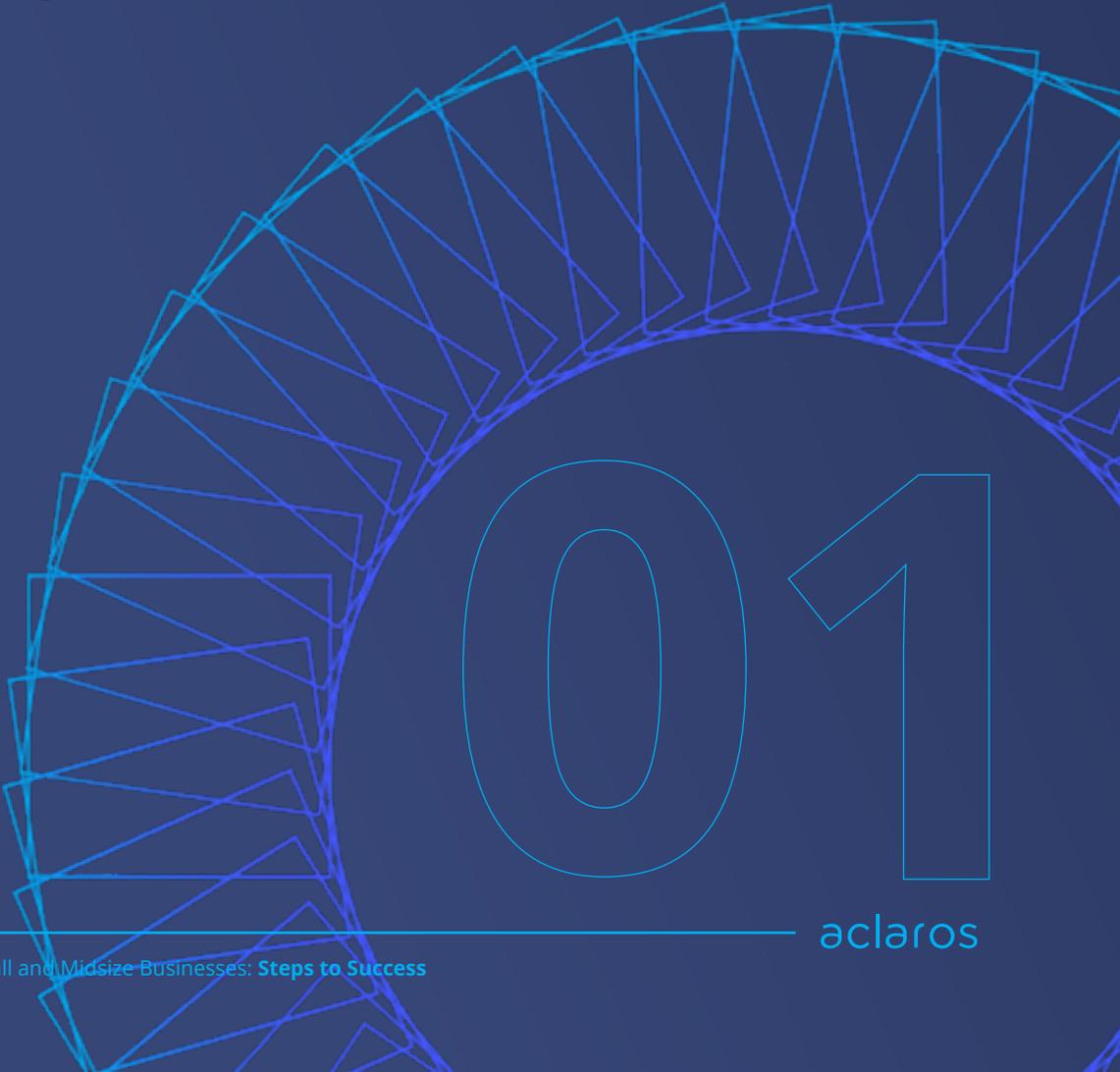
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# Hello!

It's a sweeping feeling across the globe that today's business climate can be fraught with uncertainties and unknown variables. But underneath these obscurities are the desires to advance and innovate, and improve business outcomes year-over-year. There are numerous and frequent challenges that can disrupt the normal way of doing business. As companies everywhere make a shift to a more digitally enhanced environment, they will start to realize the advantages of making such a business-critical move.



01

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Implementing an Enterprise Resource Management system (ERP) can be daunting. It's definitely challenging and difficult work, but based on how quickly change is happening at every intersection of a business' evolution, it's also inescapable.

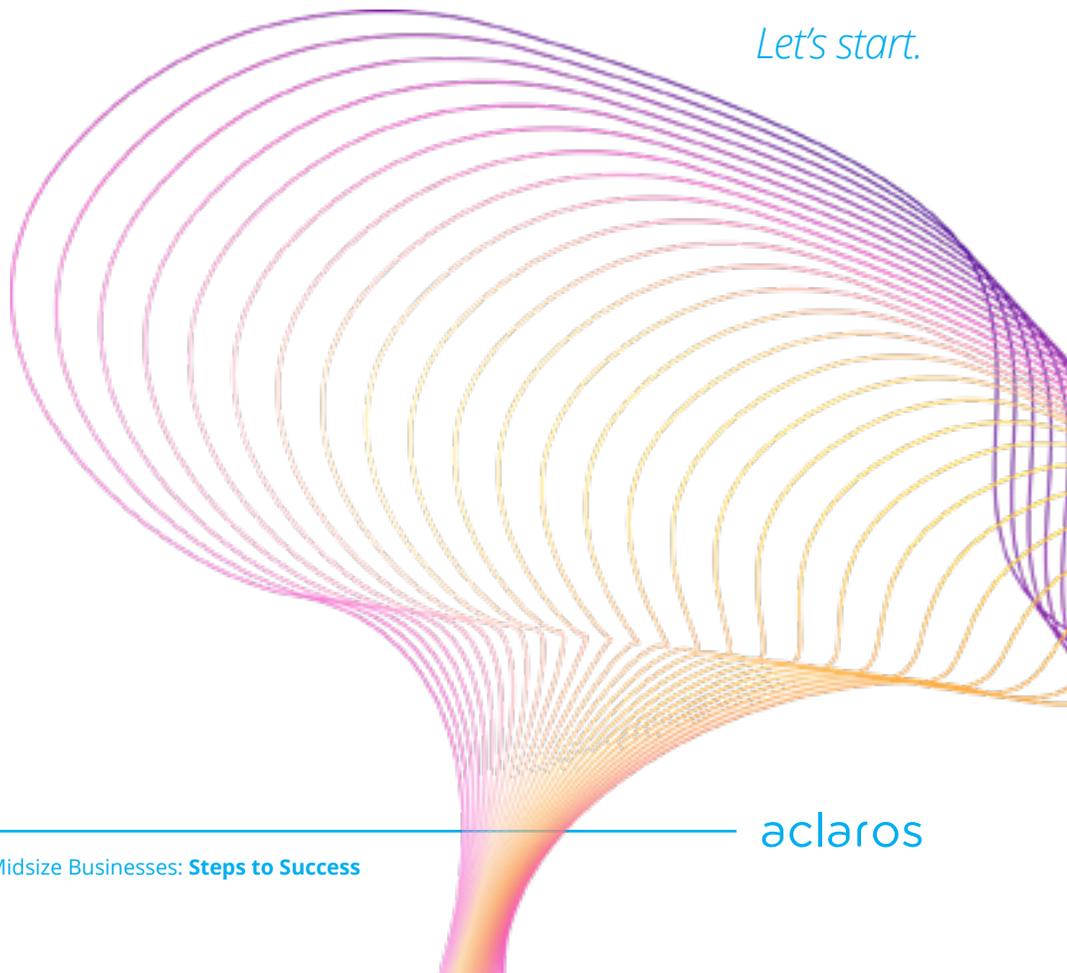
By investing to implement an ERP system, the intention is to correct and close current gaps by leveraging technology to its advantage as the organization grows and evolves. Ignoring key implementation best practices, processes, and important steps, however, can be detrimental to success; ensuring dedication to the implementation from start to finish, will guarantee a measurable accomplishment.

An ERP System can act as the central nervous system that controls internal operations, facilitate the proper checks and balances to ensure the health of

the organization and supports pro-active strategic decision making. Considering the importance of these systems, it is prudent to evaluate the key factors that drive the success of implementing an ERP system in an organization as well as the notable risks to ensure that an organization's objectives are met. An ERP implementation needs to follow a structured process, with each phase of the project lifecycle owning its own sets of challenges and opportunities.

This document details the collective knowledge of [aclaros'](#) experts and the projects they have completed over the years, and the cumulative feedback of clients. By ensuring risks associated with an ERP system implementation are clear and the benefits to an organization are understood, making a business case for change will be much easier.

*Let's start.*



# The Key Phases of an Implementation

02

It's never a good idea to underestimate the process of an ERP implementation. The new software may seem perfectly suitable to meet all of an organization's operational needs; however, there are numerous complexities that may challenge the process including technology, costs, and adoption. But with the right planning and an experienced, qualified team, an organization will experience a smooth implementation.

**By understanding the key phases and their differences, an organization is primed to successfully implement an ERP system. Just like any other organizational project, an ERP implementation will go through each of the project life cycle phases.**



## 01 Initial Phase

To start, current organizational challenges and problems need to be identified and the fundamental decision must be made to determine which challenges will be resolved by a new ERP system. The objectives, priorities, and risks of the project have been identified—with a clear understanding of the impact it will have on the organization. Approval for the project has been granted and a decision has been made regarding which ERP System will be implemented.

## 02 Planning Phase

Once the project has been initiated, it is crucial to have a clear plan for executing the project. A good plan takes into consideration all known constraints (time, budget, scope) of the project while making provisions for unknown issues that may arise. A clear understanding of the internal and external stakeholders and their responsibilities must also be established as these members should be chosen strategically. This plan acts as a baseline for the project and what the success will be measured against once the project is complete. Not until a comprehensive plan is developed and approved by the stakeholders involved will the project start to execute.

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### 03 Execution and Controlling Phase

Armed with clear requirements, the execution and controlling phase can begin. It's all about putting the plan into action and ensuring that the key objectives are met. This phase requires excellent co-ordination with all stakeholders and consistent and clear communications on the status of the project deliverables. Change requests, which happen, will force the project to deviate from the initial plan, so it's of utmost importance that the changes are clearly documented, prioritized, and their impact throughout the project is understood before making any adjustments. Keeping the end objective in sight is crucial for a successful project to be achieved.

### 04 Closure Phase

Now that the ERP is implemented, it's time to close out all project activities and confirm that the scope determined in the plan has been fully delivered. This is an excellent opportunity to review and reflect on the successes and celebrate, and acknowledge the obstacles and learn from mistakes. Ideally the end users will have taken ownership of the new system—acclimating them into their roles—and can operate independently. That being said, an ERP needs to be supported and maintained and it's imperative that a good plan and support structure are in place to avoid entropy. Beyond the maintenance of the ERP system, there is also the element of continuous improvement and getting the most of the ERP system is achieved.

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Supporting an ERP implementation after deployment will ensure users are adapting, adopting, and happier, and will guarantee the business meets its desired outcomes. The project team may still be involved to some capacity and responsible for the ERP system after the project is complete, but focus will shift to gaining user feedback and establishing stability of the system\*. New features will arise, extra training may be necessary, and additional development and configuration may be requested, but users will be well on their way to making the new system a part of their everyday activities.

# The Implementation Plan and It's Phases: Initial Phase



03

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When an organization has established that there is a need to replace current, insufficient systems, there should also be an understanding of the disruption to the business, the introduction of new complexities and how they will affect every aspect of the business, but fundamentally that the benefits will outweigh the risks. With any major initiative, clear goals, buy-in from management, and making the right decisions for the right reasons will maximize the success of the project.



The key considerations in the **Initial Phase** focus on laying the ground work and making fundamental decisions that will provide a strong foundation for the future. The initiation phase typically includes:

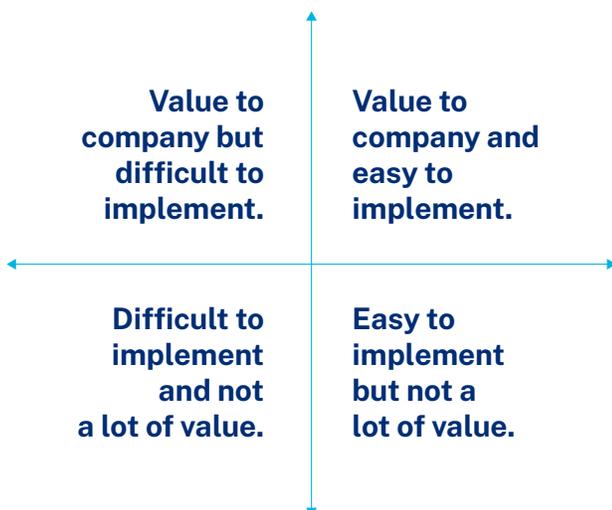
- Confirms the need for the project and it's benefit to the organization.
- Defining the key objectives and goals for the ERP and choosing the correct ERP to meet these needs.
- Authorizes resources to start the planning of the rollout.



## Defining SMART goals for the ERP

A common reason for disappointment during an ERP implementation can be due to a lack of clear measurements of success. At the start of an ERP implementation, an organization should be able to define specific, measurable, attainable, relevant and time-bound goals rather than vague objectives.

During the start of any project, implementation team members should be able to complete the phrase, *“This project is deemed a success if X, Y and Z are accomplished.”* They can be as simple as automating a mundane task or take into consideration more complex needs as bi-directional integration between remove external systems. Nonetheless, goals need to be concrete. And at the end of the project, the organization can objectively answer each phrase with either *“Yes”* we’ve accomplished this or *“No”* we have not accomplished this.



Once the goals are determined—often demonstrated as a list that is longer than what’s actually feasible to implement without running into marginal gains—the organization must live within these constraints. For this reason, the highest impacting goals should be prioritized over those that provide incremental benefits. However, do not ignore these objectives and do not lose sight of the key elements needed to be successful.

To facilitate the prioritizing process, use a tool that allows the organization to objectively position the goals against each other to determine which ones should be prioritized now versus later (or maybe not at all). Consider using a priority matrix that offsets the potential business value to the organization.



## How to choose the right system for the right reasons.

Many options are available in the market for an organization looking to solve problems. This can often become overwhelming and as a result discourage companies from really taking an analytical and thorough approach to selecting a system and often relying more on recency biases.

- Look for an ERP that has peers within a similar industry listed as customers.
- ERP software organizations that might be cost-effective may not have a strong presence in a particular industry with respect to knowledgeable resources. They will lack the ability to support and develop the application and its customers in the long term.
- Choose an ERP from a credible vendor with a healthy ecosystem. This relates to the vendors position as an ERP leader in the industry and how their product gets deployed. Consider whether the business would be working with the software vendor itself or if a strong partner community exists. Part of the decision should consider what the roadmap and future outlook is, as well as how the ERP support process works.

Organizations should have a clear understanding of what their core competencies are and align that with the goals for the ERP implementation to narrow down the potential systems for consideration to a short list.

## The Importance of getting leadership buy-in.

An ERP implementation takes considerable resources in the form of monetary investment as well as employees' time and energy. All investments need to be seen as having a reasonable benefit and return to the organization from a strategic level. If the leadership of the organization does not perceive the value of implementing a new ERP system, it is unlikely that they will provision the use of company resources to facilitate the project. A successful ERP Implementation requires an executive sponsor that will be responsible for the following:

- Supporting the respective department heads to allocate resources to the project where necessary and help re-prioritize based on competing demands.
- Act as the liaison that will communicate with other executive members on the status of the project at the highest level and highlight where demand on resources will be put – make final decisions on critical inflection points during the ERP implementation.

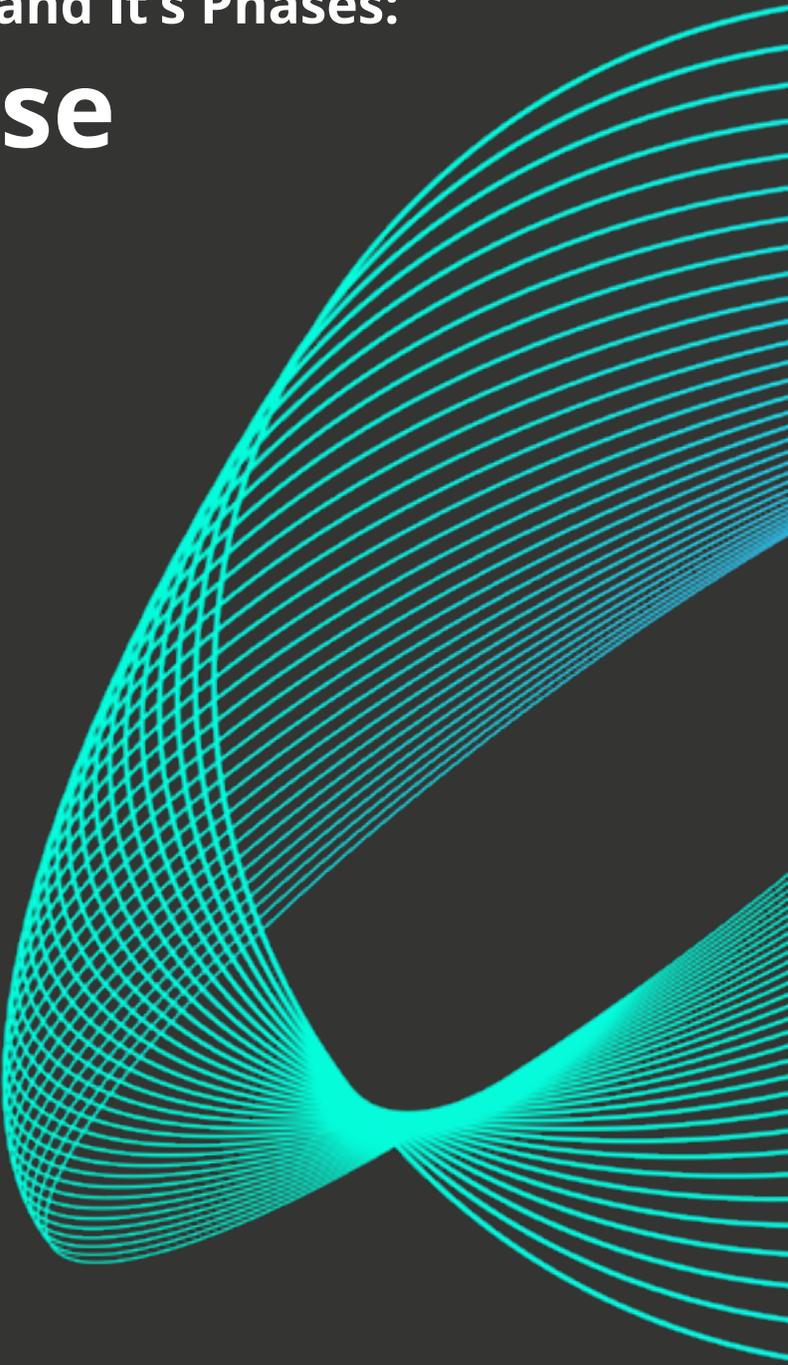
A common misconception of an ERP system implementation is that it is a project that should be relegated to the IT Department since there is software and technical infrastructure involved. This often leads to choosing either the technology best understood by the current IT team in the organization or chasing the technology on the bleeding edge. This can result in choosing technology for technology's sake and not necessarily the systems that are best suited for an organization's needs. Consider this: If the decision for choosing a car was left entirely up to a mechanical engineer, a customer may leave the parking lot with a Ferrari, but realize that there is no where to put a car seat or camping equipment. An ERP is first and foremost a business system that supports the business; therefore the people who are responsible for the success and direction of the business must be involved in the ERP implementation process, from start to finish.



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# The Implementation Plan and It's Phases: Planning Phase

"If you fail to plan you plan to fail."  
Benjamin Franklin



04

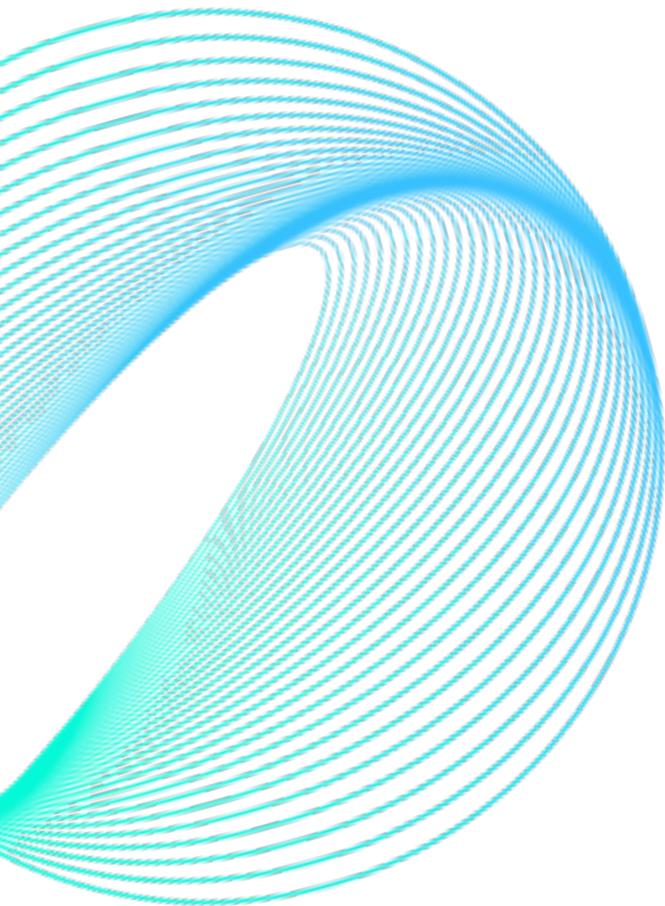
Upon selection of the ERP software a considerable amount of effort is spent on planning how the implementation will materialize over the life cycle of the project. The plans created during this phase will reinforce an organization's ability to manage time, cost, quality, changes, risk and related issues. This phase also focuses on the "how" of delivering the goals identified in the initiation phase of the project.

- **Outlines a complete project plan that includes the schedule, budget and resources**
- **Provides the baseline to execute and manage the project**
- **Approval of the plan initiates the start of the project work**

### **Ensure a proper, qualified project manager is appointed internally and externally.**

The importance of a project manager on the partner side has clear advantages. They have gone through the process many times with a proven methodology that allows the implementation team to efficiently work from one phase to the next. They are also able to clearly define the plan and the dependencies of tasks to streamline the momentum of the implementation.

What is less recognized is the importance of a project manager within the organization that is implementing the ERP. If the project manager is only external to the organization, there is no clear line of authority over the people on the project team to ensure deliverables are being met. An internal project manager will have a better understanding of priorities within the organization and other pressures that are being put on the teams' resources. They are better able to accommodate to ensure that deliverables are still being met in a timely manner and at a level of quality that allows the implementation team to continue with the tasks that are dependent on the input of the subject matter experts.



## Choosing partners wisely.

An ERP implementation requires various partners to ensure the success of the deployment.

### The ERP Implementation Partner

This is the team that will be responsible for understanding the organizations business requirements

and mapping them to the system's functionality to meet the organization's goals. This team should be able to clearly identify and architect how each business case for the organization will be processed through the ERP. It is important to pick a partner that has expertise in the area which could include industry specific experience or implementing organizations in the same or similar industry.

It is important to understand the implementation partners philosophy on the implementation process.

**Here are key considerations:**

### Implementation team members

- It is important to have a clear understanding of how many people are required.
- Does the partner delineate their resources by domain experts or does a single resource cover multiple domains. Partner that focus on having domain experts often deliver more complete and sophisticated solutions

### Requirements gathering

- It is important for an implementation partner to understand all the business processes and requirements across all departments before any system configuration is started. This ensures that all interdependencies are understood and avoids re-work which are costly and can cause major lag and loss of momentum on a project.
- An ERP implementation is not much different from building a home; not a single hole gets dug or brick gets laid before the architect's blueprint is signed off. Treat an ERP implementation as a virtual house build and ensure what will be delivered is clearly outlined as of day one.

### Configuration vs. customization:

- Configuration is any functionality provided through the system that does not affect the core software code and does not require additional attention during an upgrade.
- Customization modifies the core code of the software to meet functional requirements. It is much more invasive to the system than configuration changes and has a direct impact on the level of effort required in future maintenance.

**Example:** If a system implementation can be compared to driving from point A to point B, the configuration would provide all the possible routes on the existing roads while customization would provide options for building roads that do not currently exist. The new roads will impact the existing roads and will require additional maintenance.

## Training

A system can only deliver the benefits that it was implemented for, if used properly by end-users. In order to ensure users know how to use the system as intended it is critical to understand how they will be trained. There are many training models that vary in format and content and it is important to understand what level of training the implementation partner can provide. Training can have various formats that ranges in the level of attention provided to the end-user, the higher the level of attention the more costly:



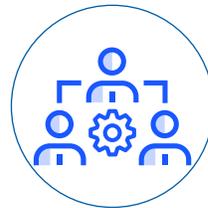
### **E-learning:**

Content is typically pre-recorded and made available to end users to access at their pace.



### **Classroom training:**

Content is typically presented live to a pre-defined group of end-users that perform the same roles or involved in the same process.



### **Train the trainer:**

Small group of super users who have been involved in the requirements and architecture of the processes in the system. Super users are trained and they in turn train the end-users.



### **1-on-1 training:**

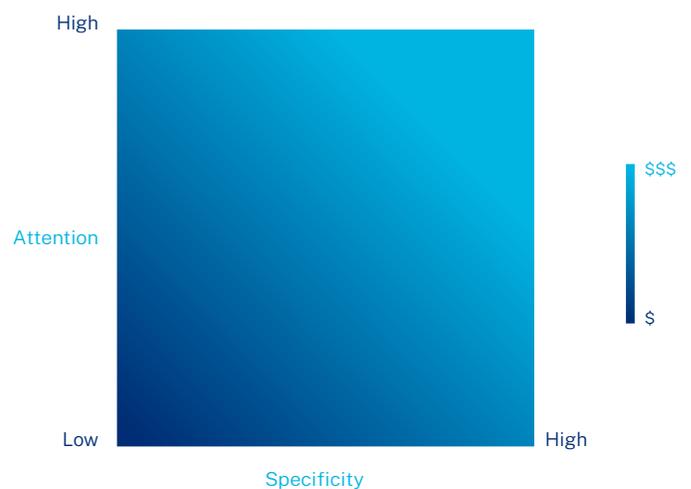
Individual sessions with the implementation team and each end-user. This provides the highest attention to end-user.



The specificity of the content plays an important role in the success of the training regardless of format. If a unique or important process is not trained correctly on the specific information that needs to be captured or steps that need to be taken, the time spent to design and configure the process will have been done in vain.

It is not mandatory to apply only one format or level of specificity across all functions and processes but rather what makes sense for the given scenario. Given the impact that the level of attention and specificity of the training has on cost the implementation partner can advise where to invest.

Once it is determined what training options will be available, it is important to understand who will be performing the training. Ideally the team should be involved in the design and configuration process to perform the training as they are most intimately involved and knowledgeable.



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## Support

Once an organization is live on a new ERP system, the involvement from the various partners becomes critical to the business since it has a direct impact on the organization's ability to operate. **There are two critical support models:**

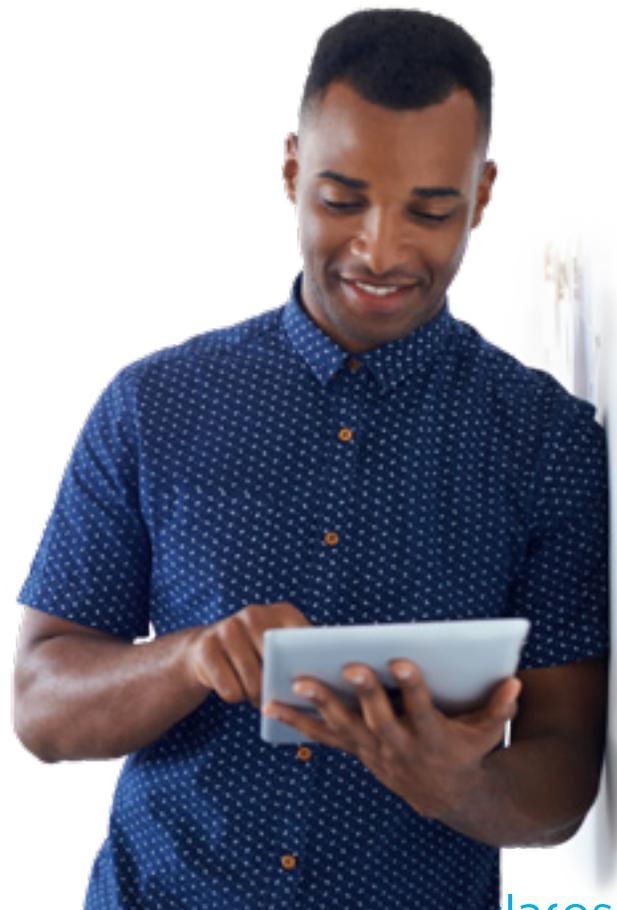
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### Post go-live support:

Support from all partners involved plays an important role in the success of the first few weeks and months after a implementation is completed. Understanding how post go-live support is delivered and structured is important, so that clear expectations are set from the start. Ideally the team members who were involved in the implementation should be involved in immediate support requests. These members are already ramped up on what the expected results are of certain processes and will be able to troubleshoot issues sooner than a new support resource. This results in faster turn-around times and less effort required during this critical phase. This support focuses on ensuring functionality that was in scope and deployed as part of the implementation are working as expected and not necessarily on net new functionality.

### Ongoing support:

This step is focused largely on maintaining the systems in place and ensuring everything is working smoothly. Since an ERP is a long-term investment, it's important to understand how the long-term support is delivered from the various partners and ensure it aligns with the organization's requirements.



## The Technical Infrastructure Team

This team will be responsible for making sure the technical environment meets the specifications mandated by the ERP, while balancing other organizational systems in use. This team can be internal or external.

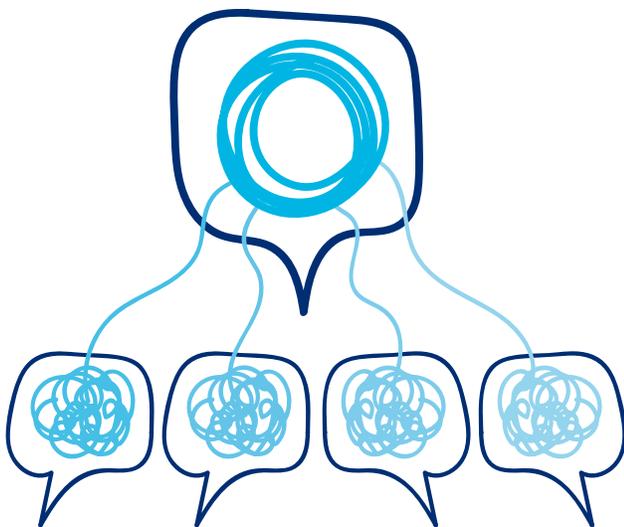
### On-premise ERP deployments:

The minimum specifications will be provided with respect to hardware, software, and network requirements. These requirements are typically provided exclusively for the ERP and it is the technical infrastructure team's responsibility to determine what modifications need to be made to accommodate the ERP requirements in the infrastructure.

### Cloud ERP deployment:

There are technical aspects like Internet connectivity and bandwidth requirements necessary for efficient use. This can depend on the number of users on the system at any given time, the type of tasks they will be completing, and the types of applications that rely on Internet connectivity and used in parallel. This team is usually independent of the ERP implementation team as they focus on the technical requirements for the organization as a whole, and the ERP system is just one "resident."

During the entire process, the implementation and technical teams work closely together to ensure a successful ERP deployment.



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# Resource availability and credibility

Implementing an ERP puts a large demand on an organization's resources including people's time and monetary and technical resources. Having available resources is one half of the equation, but the other half, and arguably the most important half, is having the proper resources to facilitate the project.

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## Money

The implementation of an ERP has two monetary views to consider: short-term and long-term costs.



Services



Licenses

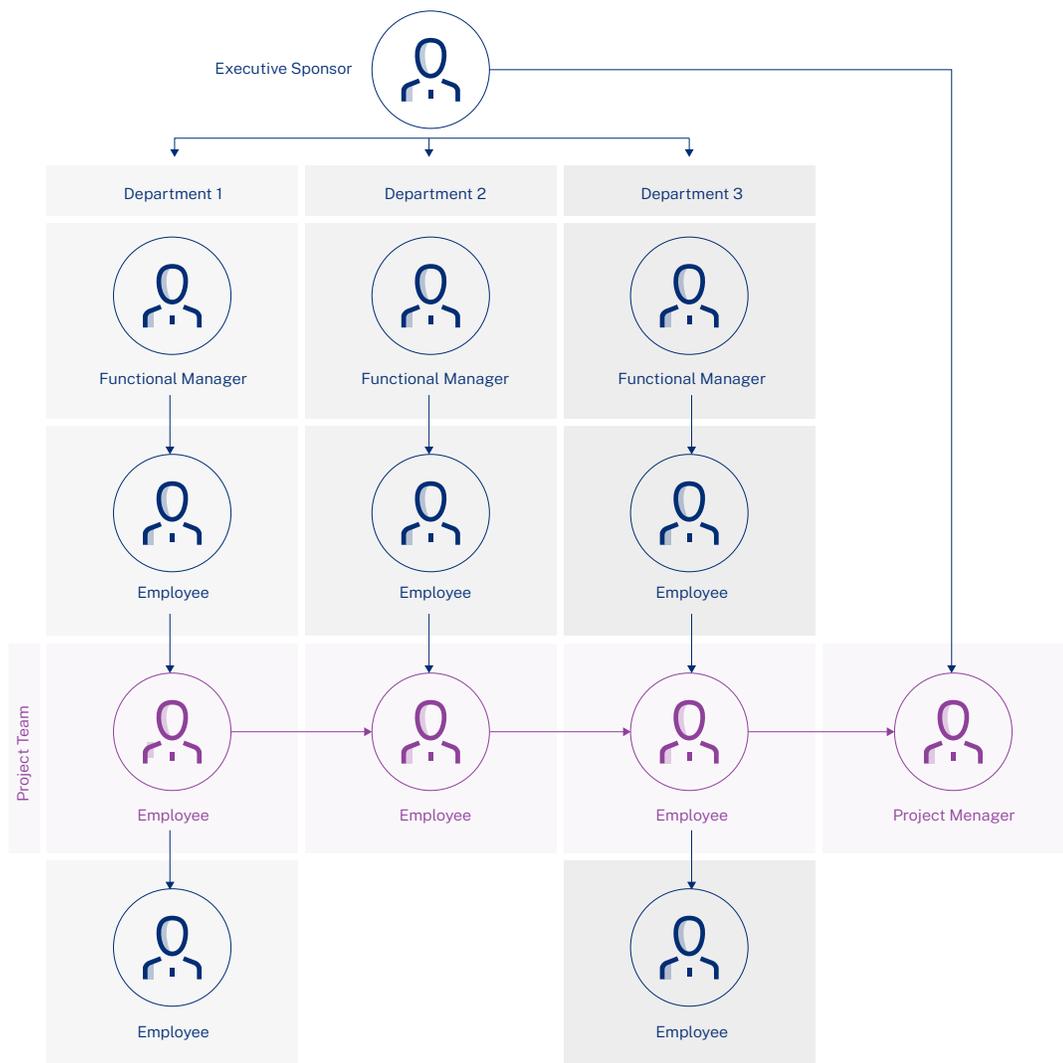


Technical  
Infrastructure

Component	Model	Short Term	Long Term
Licenses	Perpetual	Pay for the license per user upfront that allows for indefinite use of the software. This is a large upfront payment that is often treated as a capital expenditure.	Perpetual licenses have a recurring annual maintenance fee that is a percentage of the initial cost of the licenses that allows the organization access to the latest version of the software.
	Subscription	Annual fee that provides users with access to the system. The short-and long-term costs are relatively the same but are recurring each year into perpetuity or until the software is no longer used and the subscription is canceled. This is often managed as an operating expense.	
Technical Infrastructure	On-premise	High initial costs to establish the technical infrastructure and procurement of servers and software.	Maintenance of the software or replacement cost of physical infrastructure as advances in technology is made.
	Cloud	Annual fee based on resources required for the number of users accessing the system as well as the capacity required by the software.	Cost can stay relatively stable but can increase or decrease based on the organizations resources requirements or as the cost of cloud hosting becomes less expensive.
Services		Initial high number of hours required to ensure the ERP is implanted correctly; this is often the most an organization will spend on services for a project.	Lower relative to the initial implementation; as the organization grows and evolves, how the system is used may change and it's important to consult experts on the software for how to better utilize it for the organization's new needs. As new versions are released, and new functionality to get the most out of the software upgrade investment, time must be spent to understand how new functionality can benefit the organization.

## People

The involvement of Human Resources in an ERP implementation is essential. Subject matter experts will advise on how the business operates across all functions and make critical decisions about how the ERP will support those processes. They need to have a proper understanding, not only of how the organization works today, but how the leadership sees the business growing and developing into the future.



**These individuals should also have the authority and autonomy to be able to make critical decisions regarding design that will impact how the business processes are implemented.**

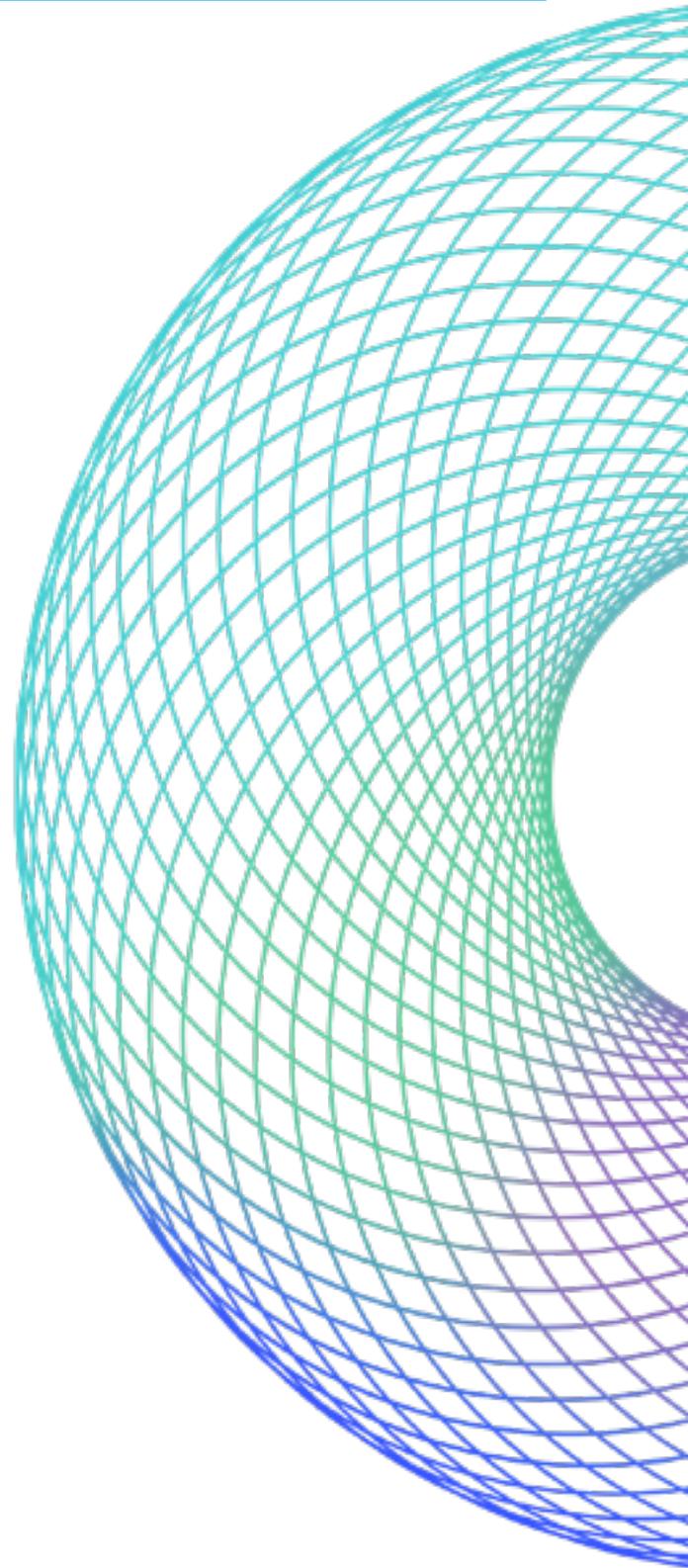
When the resources made available by the management team cannot fulfill these rolls, an enormous amount of effort is spent to explain the situation to multiple parties and therefore a lag in the momentum of the project. The project budget can quickly get eaten up by unnecessary meetings and administrative tasks. This causes frustration on all levels of the organization and the implementation.

*As Albert Einstein once stated,  
“Everyone’s a genius but if you judge a fish  
by its ability to climb a tree, it will live its  
whole life believing it is stupid.”*

**A temporary change to the organizational structure will be required as certain team members part of the implementation—due to their knowledge—will also have their existing duties as a core employee in the organization. During an implementation, a team member will have two reporting lines:**

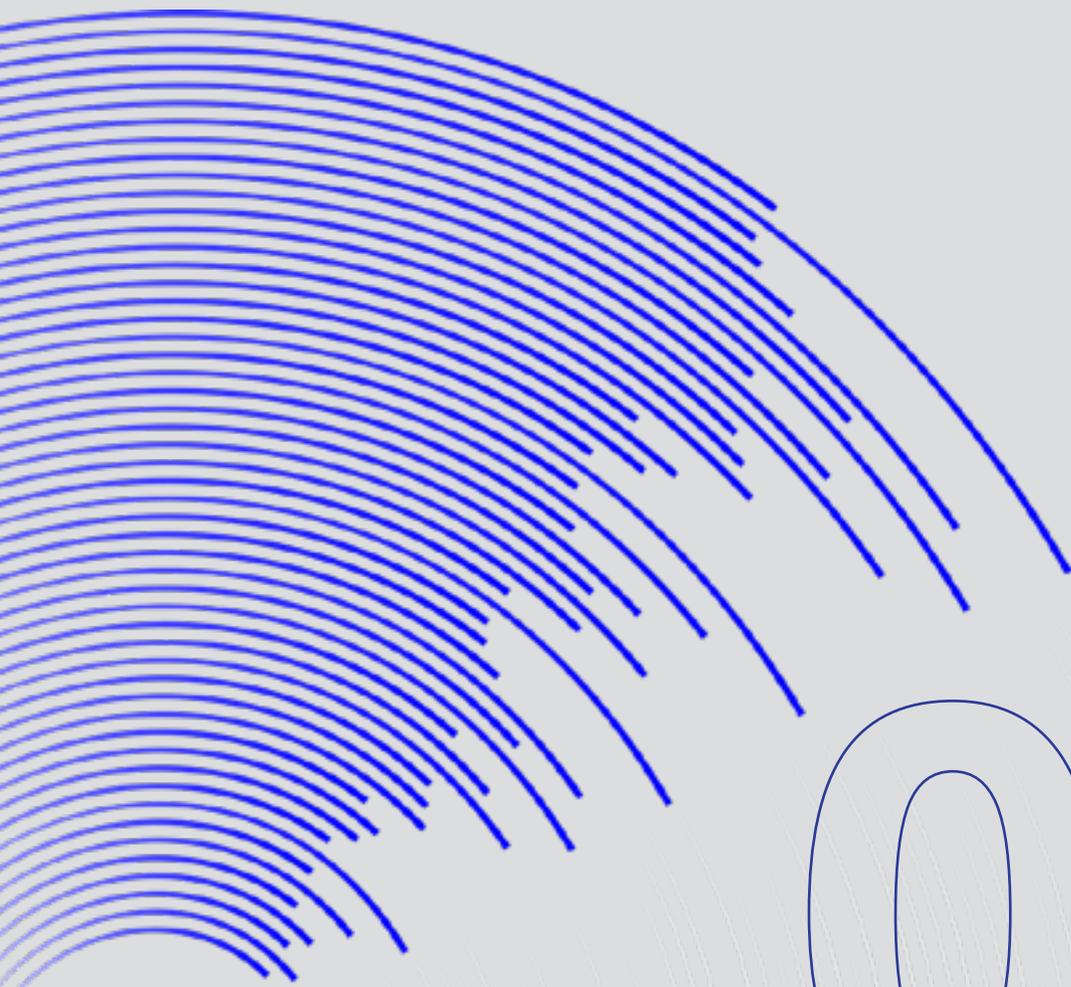
- Their direct line manager
- The project manager

Essentially, both roles above could be the same person, but that may only be true for some employees, if at all. This again focuses on the importance of a firm’s leadership and its involvement throughout the implementation. So, when conflicts between in-line duties and project duties arise, the leadership team can help prioritize from an executive level and support the implementation team as needed.



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# The Implementation Plan and It's Phases: **Execution and Controlling**



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Once the implementation plans have been established and resources have been properly allocated to the project, the Execution Phase puts the plan for the ERP implementation into action. The focus of this phase is to ensure that the deliverables and goals from the planning phase of the implementation are being executed as planned. Since the best-laid plans often go awry, it is imperative that proper controls are put in place to measure the status of the project against the baseline. The key objectives of this phase include:



- Creating and implementing deliverables outlined in the project plan
- Communicating updates to all project stakeholders with respect to progress and any deviations
- Documenting, approving, and controlling all changes to the project plan against the baseline

This phase of the project has the most moving parts, but if the project plan has been clearly defined, the primary focus should be to ensure that the design, configuration, and change management is controlled to the best of an organization's ability.

## Redesigning the process for the software: rely on the best practices.

A major driving force for implementing an ERP is to evolve and leverage technology into the next stage of the organization's growth. To properly accomplish this goal, the organization must be open to changes in their business processes and not adamantly insist with a "this is how we do things today" attitude. If what an organization was doing in their previous state was working, there would be no need to implement a new system.

Often times, inefficient practices are due to the limitations with current systems. After working in these conditions for a long enough period of time, users start believing the reason for their processes is due to the business rather than a technical limitation. The reason organizations choose highly reputable software solutions from respected vendors is due to the amount of research and development these vendors are able to

provide to ensure best business practices are incorporated and supported in the ERP.

Billions of dollars are invested every year to enable new functionality based on best business practices and it would be irrational for an organization implementing an ERP to not take full advantage of research and development robust R&D efforts.



*"The definition of insanity is doing the same thing over and over again and expecting different results."*

**Albert Einstein**

# Communicate and then communicate some more

Having a clear and structured communication plan in place for the entirety of an implementation plan plays a large role in its success: on-time delivery, scope management, and on-budget. Based on a report by the PMI, companies with minimally-effective communicators are:

52% Only 52% likely to meet project goals

37% Limited to just a 37% chance of meeting their timelines

48% Only 48% likely to do so within budget

All of these numbers contrast highly effective communicators on a project team, 80%, 71%, and 76% respectively.

If project stakeholders are not consistently informed of a project's progress, anxiety and disengagement can result. Furthermore, if large periods of time elapse with respect to progress updates—issues that could initially be considered small—they can compound into larger problems far more difficult to resolve reactively than one word.

It is advised to setup progress status meetings with the project team in recurring predictable cadences, so that team members are aware of the expectations and know the time is spoken for. It's not what is done well, but rather what is done consistently that leads to success.

Communication is of critical importance to ensure the project stays on track, but what is equally important is communication to stakeholders that will be impacted directly or indirectly by the implementation of the ERP that are not involved in the daily events of the project. The earlier the communication starts in the project the more co-operation and buy-in can be expected. These communications can be in the form of monthly newsletters or town hall meetings where the executive sponsorship as well as the implementation team can share updates and recent project successes.



Figure 3. Organizations that communicate more effectively have more successful projects

## Change Management

An ERP Implementation inherently results in large changes to how an organization and its employees operate on a day-to-day basis. If the change is not managed skillfully, the success of an implementation could be in jeopardy.



**According to McKinsey, 70% of change programs fail to achieve their goals due to employee resistance. On the other hand, where employees are truly invested, they are 30% more likely to retain and absorb the impending changes.**

It's important to not only communicate the impending changes, but to share the importance of why the change is occurring and what that means for all members of the organization. Understanding the changes and the future benefits of these changes will accelerate the acceptance of the change and demonstrate the advantages of the changes to the organization as a whole.

Change management is about communicating the changes as it is giving all parties the opportunities to get practical experience with the changes. To ensure these practice sessions are effective, a productive and extensive training plan must be developed and deployed for all users of the system.

# A recent report by Google with respect to change management found:

135%

*A well-prepared change program can deliver a “135% positive return on investment and result in a more fulfilling workplace.”*

67%

*Change champions play a crucial role, according to 67% of respondents who had change champions and whose projects successfully delivered against quantifiable objectives.*

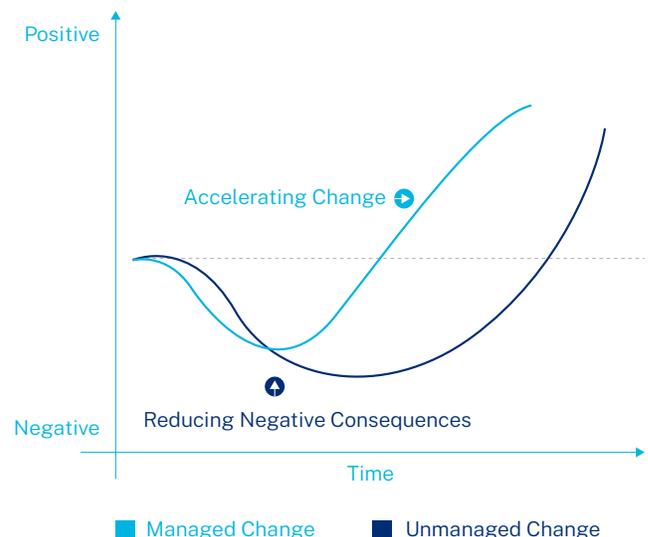
69%

*The majority of executives who considered their programs successful (69%) offered training before and after go-live.*

*The activities that most improve employee engagement include increased levels of executive sponsorship (45%), increased consultation with frontline employees to discover needs (42%), and improved communications (34%).*

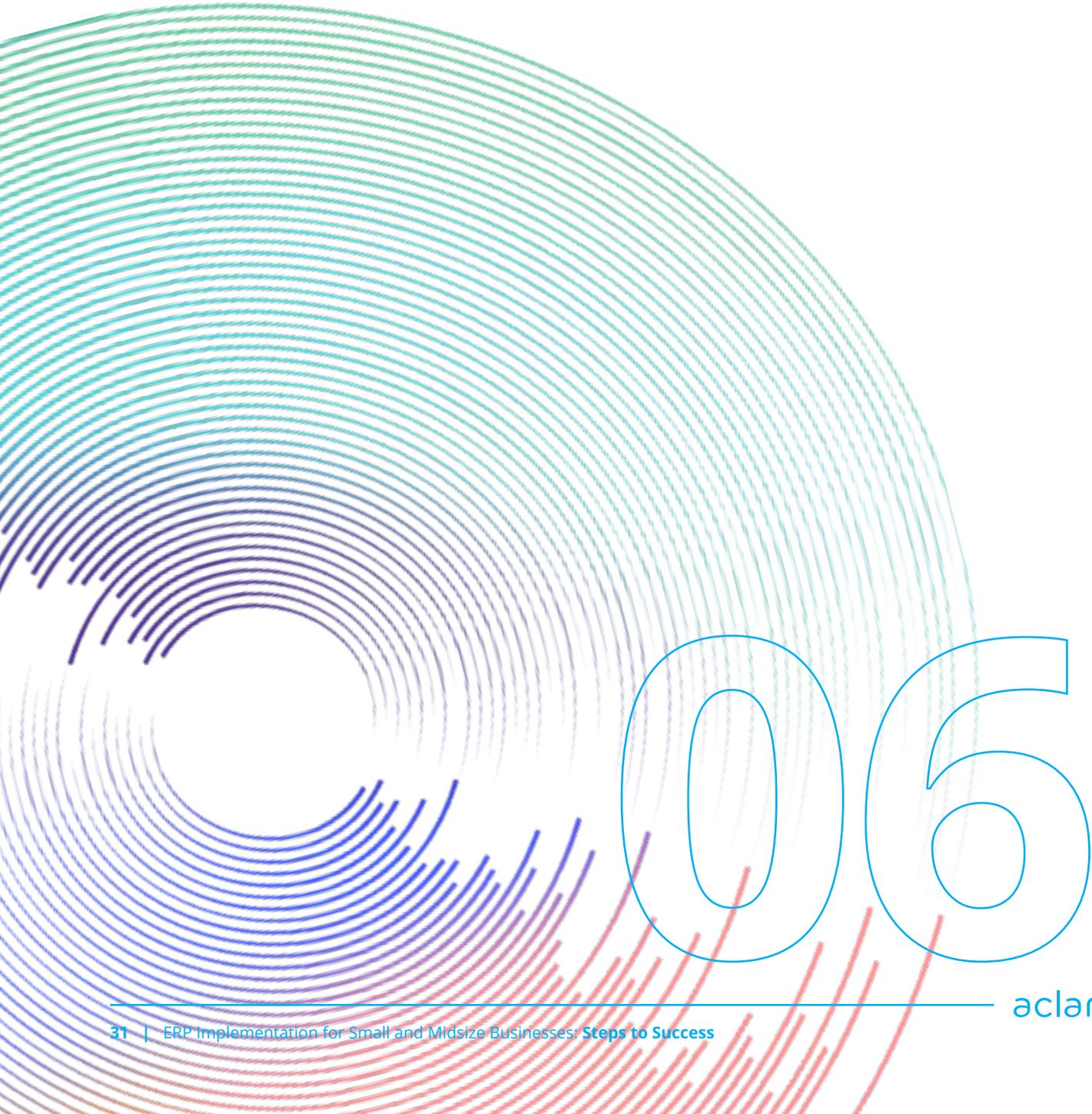
*Organizations that offer mixed-format, mandatory training were significantly more likely to meet their project objectives.*

The below change curve, originally developed by **Elisabeth Kubler-Ross**, explains behaviour as people react to changes and the impact it has on their performance. The difference in the two lines in the graph below indicates how the intensity of the human behaviour can be managed based on an effective change management plan. It's worth noting that the curve follows the same pattern, but the magnitude of the negative impact is less and the positive change that the organization is implementing is accelerated.



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# The Implementation Plan and It's Phases: **Closure Phase**



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The Closure Phase and final stage of the project concludes the implementation of the ERP. The ERP has been configured as per the design specifications to meet the goals and objectives outlined by the organization. The organization takes ownership of the system and is expected, based on the training and knowledge from the prior phases, to continue the momentum of the ERP's success with the support of the implementation team. The legacy systems are demoted and the ERP is promoted to the primary system.

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## The key focus of this phase is to:

Close project activities and confirm scope delivery.

Give the customer ownership of the finalized product.

Establish a continuous improvement and support plan.

**Upon closure of an implementation project, it's an opportune time to reflect on the initial goals outlined in the initiation phase and identify what has been successful and what has failed and why. The three fundamental questions to be answered in this final phase are ...**

1. Where did we come from?
2. How did we get here?
3. Where are we going?

## Where did we come from, and did we succeed?

The only way to determine whether the current state is a success is to measure it against the prior state, and determine whether the difference between the two line up with the goals determined to identify the project as a success.



**If the goals and objectives were not clearly identified in the beginning, the closure of a project can result in feelings of uncertainty from the project team. The question of “Was this project a success?” becomes an emotional and subjective response rather than an objectively analytical response without clearly defined goals.**

Throughout the project, the priorities of goals may have changed and new goals may have been introduced with respect to the cost, **scope**, and schedule, but it is important that during the process the baselines have been updated to reflect these changes. Perhaps a specific deliverable has been moved to a secondary phase. There is nothing wrong with moving objectives as long as the stakeholders understand the reasoning for these changes and the impact that it will have on the project.

If goals have been met, it's important to celebrate these successes.

**If the goals have not been met, it's important to identify why.**

- Internal reasons could be controlled—lack of resources, inability to make concrete finalized decisions regarding designs and poor training.
- External reasons are harder to control—dramatic market condition changes and global pandemics. Focusing on the challenges that are internal are productive and can result in a plan to rectify or ensure completion of the project goals.

## How did we get here? Time to assess with a post mortem.

Every project provides an opportunity to learn important lessons regarding how the organization and implementation team performed. The only way they can improve is to identify where their strengths and weakness are and how to turn their weaknesses into strengths.

**With an ERP implementation, the initial implementation is rarely the last project the team will be engaged in and, therefore, important to learn from past mistakes and identify what tools and techniques worked well to fine tune the team's skills.**

*"History does not repeat itself  
but it does rhyme."*

**Mark Twain**



## Where are we going? Let's start planning for the future.

Once the ERP system is implemented and actively being used, it's time to plan for the future. An ERP is just like any other organizational tool and must be used properly and maintained to avoid eroding the value of the investment. There are two aspect to the future:



### On going support and maintenance

**Determining a support program enables an organization to swiftly identify and address issues within the ERP. An effective support program starts from within. End-users should have a clear communication path to identify and report issues to super-users, and if the internal team can resolve the issues, confidence can be gained and self sufficiency maintained.**

There are instances where the internal team will not be able to solve a problem for various reasons—a bug in the software or lack of knowledge on a particular aspect of the software. This will require the support of the external organizations like the implementation consulting team for ERP software reasons or the IT companies for technical and infrastructure issues. It's often difficult for end-users to identify whether

the issue is related to the software or the infrastructure therefore it is important that the IT organization and the implementation consulting organization work well together to help solve the problem.

ERP upgrades are a necessary process to ensure organizations stay current with the supported version of the software. ERP vendors are producing newer versions of the software faster than ever, and with these new releases come notable improvements to the software, but also means corrections to known software bugs that may impact an organization's processes. A credible ERP vendor will provide clear documentation on known bugs in the system, what their impact(s) will be and any known workarounds. Release notes are also provided to outline software version fixes, allowing organizations to determine whether a bug impacts their business processes and determine the urgency to upgrade to the latest version of the software.

## Continuous improvement

The implementation of an ERP is often the initial step during an organization's digital transformation. The focus in the initial implementation is to achieve the fundamental aspects of the business properly implemented and provide a solid foundation for the future of the organization and the ERP.

**Since all organizations have constraints on resources, time, and money, all the functionality or benefits that can be gained from the ERP are not done in the initial implementation and for this reason, it's important to put a continuous improvement plan in place.**

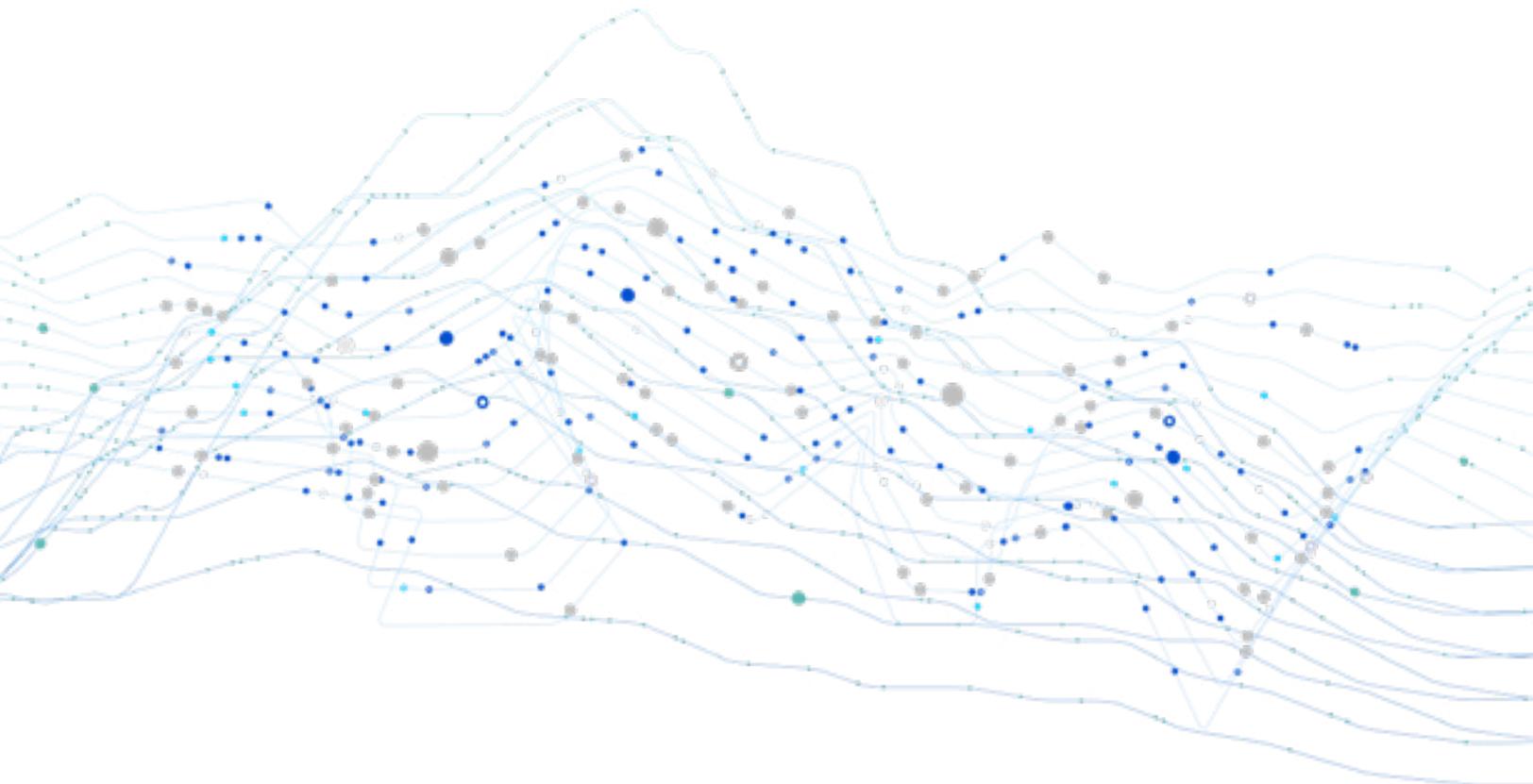
Throughout the implementation of the ERP, the subject matter experts will be exposed to the breadth of functionality in the system beyond the initial scope. These initiatives can be put on a "parking-lot" list that will function as the starting point for the continuous improvement. And, if possible, an organization should start these continuous improvements as soon as the ERP is stable and as users gain confidence. This keeps the momentum of the new system as a key focus in the organization and sends the message to the rest of the organization that this is just the start of improvements and there is more to come.

Since the best ERP vendors in the market are consistently using the latest technology to develop additional functional, it's also important for the organization to stay abreast of these new and upcoming changes. Vendors will provide roadmaps of future functionality, with some holding user conferences to provide as much information to the customers as possible to help with their future initiatives.



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# A Checklist of Other Considerations



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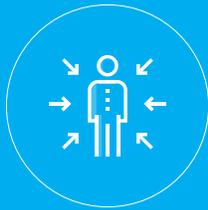
- ✓ Ensure continued support from senior managers
- ✓ Rinse data often and keep it clean
- ✓ Zoom, zoom! Take new ERP for a test drive
- ✓ Then test again and repeat
- ✓ Turn users into experts and devote time for training



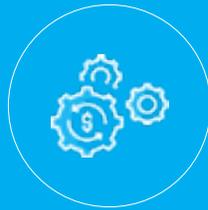
C-suite,  
Executives,  
Senior  
Managers



Finance,  
Accounting



Human  
Resources



Sales



Logistics  
Specialists

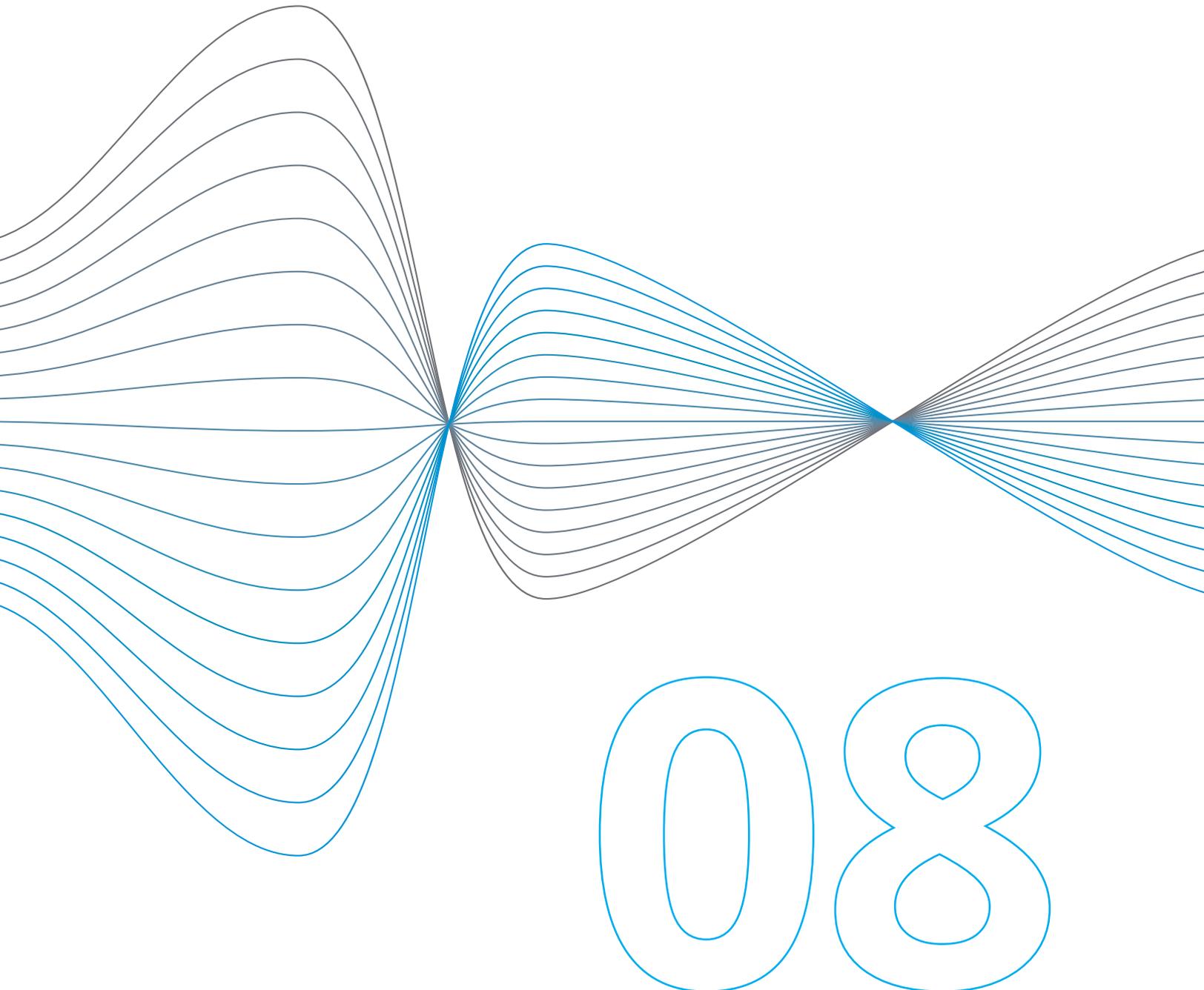


Supply  
Chain and  
Warehouse Staff

- ✓ The organization is adopting and adapting for the better
- ✓ Consistently evaluate the success of ERP
- ✓ Stay optimistic
- ✓ Stay the course especially over time

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# A Few Final Thoughts



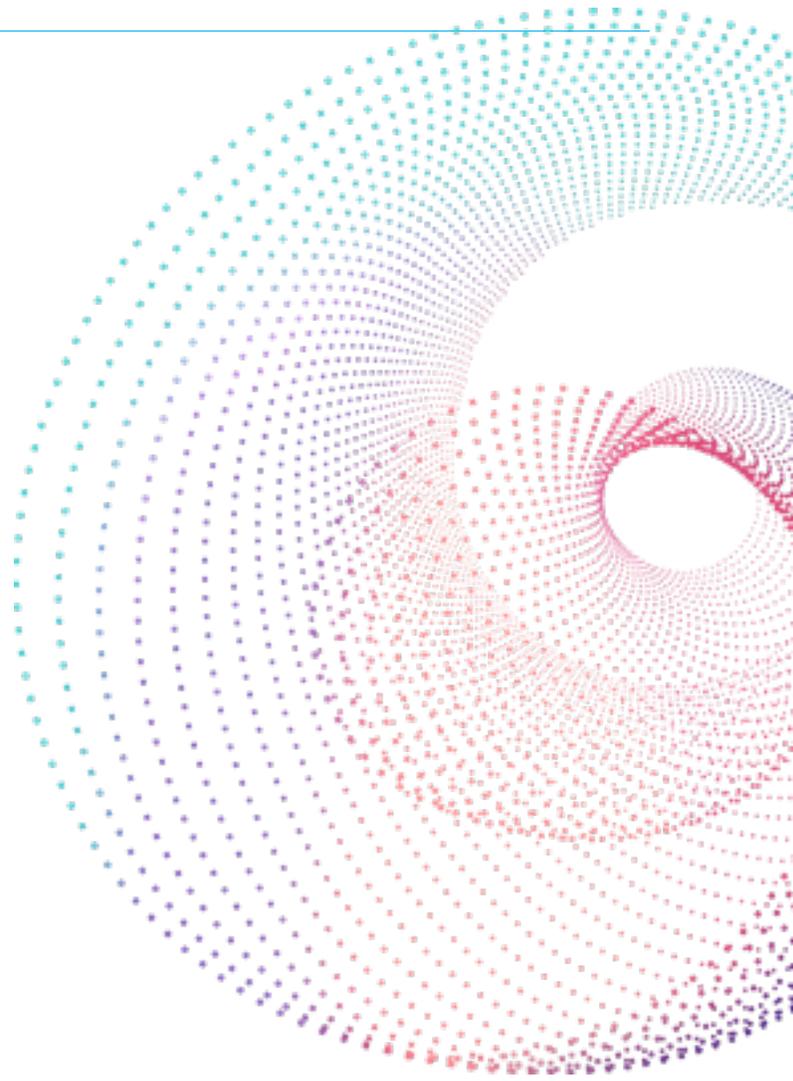
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## A Few Final Words

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A lot has been shared, but there's so much more to chat about. Everything here (and more) is necessary to the success and should never underestimate the effort that has gone into implementing a new and improved ERP system.

By understanding and addressing needs, a service provider can establish a timely, in-scope, and on budget implementation that will create cross-functional teams early on, establish executive sponsorship, and ensure the proper expectations are set early on and maintained throughout. Having a go-to implementation partner that a business can trust, that is confident in the work, and that can help provide guidance at every stage throughout the process will give the organization the added value needed to ensure a successful implementation.



*Here's to the success of every organization's ERP journey.*



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Irenae Jacobs

Vice President, SAP Business One

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