



**1 BE CLEAR ON STRATEGIC GOALS**

Understand the **'why'** and be clear on the main drivers for implementation of an ERP Solution. Consider the high-level strategies but also the practicalities of daily operations. The full scope of the project should be clearly set out and a set of measurable criteria be documented so that the expectations of all stakeholders are understood and that everyone is clear on the deliverables. It is advisable to have a time phased approach to setting project objectives so that they can be evaluated over an agreed timeframe after implementation.

**2 IDENTIFY YOUR IMPLEMENTATION TEAM**

Identify all personnel that will be key players in the role out of the ERP Solution. This should include top management, Project Manager, IT Specialist and a cross section of representatives from all aspects of your operations (production, quality, admin, accounts). Depending on limitations of existing company resources this may require additional support from external consultants. Work closely with your ERP provider and draw from their experience of your industry.

**3 KNOW YOUR BUDGET. IDENTIFY NEEDS & WANTS**

Like any project, an ERP implementation will have elements of **'must have's'** and **'nice to have'**. Setting and managing the budget can be challenging and needs to be continuously monitored. All aspects of the implementation must be identified not just the obvious expenditure on software and hardware but also costs relating to set up, customisation, report and label design, training and post go-live fine-tuning. With regard to customisation, it is also important to consider which of your current business practices are unique and necessary or if there is scope to adapt without compromise.

**4 IDENTIFY & STREAMLINE PROCESSES & PROCEDURES**

A good fit between the software's functionality and the business requirements is crucial. This will require careful review and discussions to ensure that the ERP Solution you select satisfies and preferably exceeds both your current and any anticipated internal business processes and industry specific features and functions.

**5 HAVE A CHANGE MANAGEMENT PLAN**

Identify everyone who will be affected by the change and communicate the objectives and reasons for the move and the expectations with regard to their involvement. Have a schedule for implementation and clearly and frequently communicate any changes to the plan. Ultimately, the key to ERP success is ensuring that people understand the long-term benefits and embrace the change.

**6 SELECT THE BEST ERP SOLUTION FIT**

Implementation of an ERP Solution is an ideal opportunity to evaluate current practices and identify gaps in current production and administrative processes and procedures. In order to successfully execute the move, the work and data flows within the organisation need to be clearly mapped. Once that is done then system set up will be greatly facilitated.

**7 CLEANSE AND MIGRATE DATA**

One of the key steps in the set-up of a new ERP system is the importing of existing masterdata from legacy systems. One of the huge challenges here is evaluating the completeness and accuracy of that data and standardising data files to ensure system integrity. Everyone involved in this part of the process must have excellent attention to detail and be committed to producing complete and accurate files that will become the foundation of the new system.

**8 TEST, REVISE, RE-TEST, REPEAT**

Because ERP systems are so flexible and complex the only way to ensure that everything is working in accordance with the specific requirements and practices of a given business is to test all key stages of configuration and set up. Testing should be an iterative process of evaluating problems and identifying gaps. Investment of time and resources in system testing at all stages will enable a smooth go-live which is a critical element in getting buy-in by users of the new system.

**9 CONTROL, VERIFICATION & TRAINING**

Ensure users have the correct access levels and permissions to complete their work while also preventing access to areas within the system outside their remit. This requires careful input from relevant senior management representatives. Check as part of the final verification procedure. Once the test company is set up then the process of training can commence. Initial training will be done with the core implementation team so that they can familiarise themselves with the system and can participate in decisions relating to system set up and testing. As go-live date approaches, more personnel will need to be trained so that they can bring real-life insight about day to day practicalities that may have been overlooked by the implementation team. Everyone will require a base level of training to ensure that they can execute the transactions that they need to do their jobs. However, during training it will be possible to identify individuals, most likely supervisors and managers, that can champion the system and these people should be given additional training and mentoring as they will play a crucial role in ensuring successful roll out and on-going support at ground level.

**10 EVALUATION**

This is where the original deliverables set out at the start of the project are reviewed and assessed. It may also be possible that the insights gained through the implementation process will lead to new or revised objectives for continual improvement of the system and/or internal business processes. It is also important at this stage to re-visit the **'needs'** and **'wants'** that arose at the start or during the project to assess these are required in the short or long term.