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# Ways to Not Derail An ERP Implementation



*An introductory guide to keep your ERP Implementation on track.*



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ERP Implementations are a huge undertaking and without the right knowledge or resources, execution can easily be steered off track.

Our team at Western Computer has put together a list of common mistakes that you should consider to avoid derailment.

# AVOID THESE COMMON ISSUES TO KEEP YOUR ERP IMPLEMENTATION ON TRACK

## Potential Derailment

- [1. Inexperienced Project Management](#)
- [2. Not Understanding ERP Capabilities](#)
- [3. Too Many Customizations](#)
- [4. Migrating Unnecessary Data](#)
- [5. Not Appointing a Internal Enthusiast](#)
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# #1 Inexperienced Project Management

## STAY ON TRACK



Elevates the role of project manager to a quality-centric, value-added resource by combining project management expertise with *functional* expertise, a deep knowledge of people, processes and product functionality.

## You'll Get Derailed If

You stick to a narrowly focused Project Manager role, fixated on the tactical elements of the budget, schedule, and status reporting. This adds to project overhead and neglects an opportunity to ensure that your ERP implementation drives successful business transformation that makes sense and adds value.



## WESTERN COMPUTER RECOMMENDS:

Select an ERP partner that has dedicated project managers who play an active role which adds a layer of quality assurance to the process.



# #2 Not Understanding ERP Capabilities

## STAY ON TRACK



Understand the capabilities of the new ERP system as well as out-of-the-box functionality and carefully map business processes that take these capabilities into account.

## You'll Get Derailed If

You configure the software to reflect your current processes. This wastes an opportunity to introduce organizational efficiencies by reengineering processes that could benefit from the automation or workflows built into the software.



## WESTERN COMPUTER RECOMMENDS:

Follow [Microsoft Dynamics Sure Step](#) methodology. Apply industry best practices to the unique needs of your business, to introduce software-driven efficiencies and automation.



# #3 Unnecessary Customizations

## STAY ON TRACK



Avoid abusing customizations and stay as “out-of-the-box” as possible. You selected a new ERP system for its features and benefits; be sure to take advantage of all its functionality.

## You'll Get Derailed If

You focus on customizations. These can be costly to develop and maintain, and that may complicate future software upgrades.



## WESTERN COMPUTER RECOMMENDS:

Work with a dedicated project manager who is familiar with all your ERP functionality. This allows you to minimize customizations. Using the Client Requirements Fit-Gap Analysis to document your requirements, the fits and gaps, along with any potential work-arounds will give the team a documented decision making tool that can be reviewed, discussed and used to track requirements, options, recommendations and decision results throughout the life of the project.





# #4 Migrating Unnecessary Data

## STAY ON TRACK



Determine what legacy data is needed in the new system.

## You'll Get Derailed If

You migrate all of your data to the new ERP system. Converting all historical data is not only difficult and tedious – it brings lots of clutter and duplicate data in your new system.



## WESTERN COMPUTER RECOMMENDS:

Hold Data Migration discussions early and use the Data Migration template found within the Sure Step methodology to walk you through the data migration approach.

[Watch our video series on Data Migration.](#)



# #5 Not Appointing Internal Enthusiasts

## STAY ON TRACK



Appoint "*Champions of Change*," key users who are involved in helping model the processes & to define the future state.

## You'll Get Derailed If

You don't have advocates of the system. A new system affects the entire organization and you need champions that are willing to lead the way for the rest of your organization. Champions of Change are typically the first to test functionality and provide feedback.



## WESTERN COMPUTER RECOMMENDS:

Identifying end-users within the client organization to be trained as super users who can participate in training, testing of the solution and its documentation, and who have the ability to grow into a subject matter expert or have the ability to work with end users or deliver end user training. These people would be actively involved with the project from beginning to end, testing functionality, defining scenarios, creating test scripts, validating training and lab materials, as well as validating accuracy of user guides.





# #6 Insufficient Training

## STAY ON TRACK



Provide ample training to all users as well as to your IT team. Training is essential to leverage the system's capabilities.

## You'll Get Derailed If

You do not provide enough training. You should give your employees the time to learn and become comfortable with the new system. Limiting training negatively affects user adoption.



## WESTERN COMPUTER RECOMMENDS:

Deploy a training schedule that coincides with your go-live schedule. This greatly enhances your return on investment. Trained, confident and comfortable users in a system equates to user acceptance of the delivered solution. A training plan is key, but keep in mind, your training plan should speak to a broad range of individual learning styles. [Learn how Western Computer can help you with training.](#)



# #7 Ignoring Future ERP Needs

## STAY ON TRACK



Keep in mind product upgrades. There are usually four primary reasons why users should upgrade: efficiency, features, compatibility, and/or supportability improvements.

## You'll Get Derailed If

You become version-locked. Microsoft has announced annual upgrades of their products; you should be sure that you are using the system in a way that allows you to develop a regular upgrade schedule.



## WESTERN COMPUTER RECOMMENDS:

Keep in mind Microsoft's annual release system. Prepare your organization for [regular upgrades](#) to take advantage of enhanced functionality and improvements.

We also recommend conducting [Annual Business Reviews](#) to determine the use of your system and opportunities for improvement.



# #8 Disregarding Timelines

## STAY ON TRACK



Create a project timeline from the initial kickoff. Be sure all team members agree to the timeline and expectations that are needed from them.

## You'll Get Derailed If

All resources of the implementation are not adhering to the same timeline and benchmarks.



## WESTERN COMPUTER RECOMMENDS:

Read our blog [Timing is Everything](#) written by our Director of Client Services, Tony Castellano, to learn best practices and view a rough schedule that your company can follow.



# #9 Neglecting a Phased Approach

## STAY ON TRACK



Develop a post go-live strategy. Successful use of the ERP system does not stop once the product is live.

## You'll Get Derailed If

You try to implement all business process at once. This "Big Bang Approach" is not only more time consuming, it usually leads to more costly initiatives. A phased approach allows you to understand the new functionality you have available with the new system.



## WESTERN COMPUTER RECOMMENDS:

Road mapping a phased approach to implement your new system. Prioritize your business requirements, separating core processes and mission-critical functionality from the "nice-to-haves." Your initial implementation should include all of the "must-have" items. Don't be surprised to find that your priorities after the initial go-live may have shifted since you had become familiar with the system. Read our blog [ERP Phased Implementation: The Key to Real Success](#) to learn more.



# DO YOU HAVE ADDITIONAL CONCERNS REGARDING AN ERP IMPLEMENTATION?

*We are here to ensure you stay on track.  
Contact us today to speak to an ERP expert to  
map out your ERP and business needs.*



CONTACT US TODAY

*“Western delivered on time, on budget,  
and there were no problems after the  
go-live date. We were very happy with  
the results at the end of the day.”*

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