ERP/CRM selection & implementation

Evolving Office

Making the Right Choice for Your Business

Choosing the software and resources to run your business is a challenging task: a poor choice will make everyday tasks painful and tedious; a wise choice that is implemented properly can help your business operate at peak efficiency. The decisions have a long lasting effect, either increasing productivity and ROI, or creating more frustration and running high in costs.

Evolving Office has defined a way to help businesses manage one of these difficult decisions: ERP/CRM selection and implementation process from beginning to end. We've put together a seven-step guide to success.

Please note this is only a guide. The individual needs of your company may require more, or even, fewer steps. Choosing qualified ERP/CRM selection and implementation experts can make the difference between success and failure.

ERP/CRM System Selection: A Seven-Step Guide to Success

I.   **Strategic Plan – Rationale and Making the Business Case**

   a. There are likely many underutilized resources in your organization; management should acknowledge the many conflicting demands of an employee's time, they should also be managing the required time and resources needed to make the project implementation successful.
   b. Research and education must be done to help explain company-wide benefits of a successful project; concerns and possible challenges must also be communicated.
   c. "Business Champions" should be identified - individuals willing to take on the additional responsibilities to help document business processes and objectives and to ensure the ERP/CRM program meets these strategic objectives and their timelines.

II. **Readiness Assessment**

   a. Achieve organizational understanding
      • Help the organization understand what an ERP/CRM system does and doesn't do
   b. Discuss internal strengths and weaknesses
      • Technical preparedness - Does your organization have a capable network, servers, hardware, software and phone systems to complete the project? Does it have skilled IT staff to effect the changes and maintain systems after going live?

- Functional preparedness - Does your organization have adequately experienced staff to see the project through to completion?
- Leadership - Is management and/or upper staff ready for this change?
- Communication - Are internal mechanisms in place to communicate action items, delegate tasks and communicate possible challenges?
- Resources - Are human, financial and time resources available?
- Cultural preparedness – Is your organization ready to make a change of this caliber?

III.   Prepare for Vendor Selection – Document Business Practices

a. Develop a list of specific requirements needed in ERP/CRM selection; the list should include desired features of the system to be matched against ERP/CRM availability.
b. Acquire a high level of understanding of how the organization's business practices may be affected by implementing the ERP/CRM solution and realize that many steps of your business process may change. Have all internal processes been documented? Preceding that, have all internal policies been documented? In order to match how vendor products can handle the way you do business you must have something to crosscheck against.

IV.   Selecting ERP/CRM Vendors

a. Key decisions when selecting your solution(s)
   - Using an implementer? (Yes! Evolving Office!)
   - ERP vendor screening mechanisms that can be utilized
   - Request for information (RFI)
   - Reference checks
   - Site visits
   - Scripted/unscripted demonstrations
   - Request for proposal (RFP)
   - Fit-gap analysis
   - Oral presentations
   - What decision making process will you use?
   - Decision criteria selected and weighted according to importance
       o Vendors scored on these criteria
   - Involvement by owners and senior executives
   - Vendor selection expert? (Yes! Evolving Office!)
   - Additional third party software required? (Sometimes additional resources outside of the ERP/CRM must be purchased to cover areas where the selected ERP/CRM solution is weak. These are usually done after the ERP/CRM selection is completed.)
   - Vendor selection is a form of partnership that your organization will have to work with for a long time. Periodic enhancements and upgrades may happen for years to come.

V.   Plan the Implementation

a. Prepare for success! Once the vendors have been selected a full project plan should be put in place that will be the management guide for successful implementation.

- Scope document - Defines purpose, goals, rationale, budget, duration, limits and boundaries of the implementation
- Project schedule - Organized list of all tasks that must be completed that includes owners for each task. All task dependencies must be captured with a link to predecessor and successor tasks. This comprehensive schedule should also include third party software implementation tasks.
- Project organization - Project sponsor, steering team, implementation team and various functional and technical teams that will work with implementer to get software adapted and working

b. Project budget
- Software licenses
- Implementer fees
- Additional consulting
- Staffing costs
- Third party software
- Other expenditures

c. Risk analysis of critical issues that must be addressed
- Communication plan - Include for all company stakeholders
  - Content, types and frequency of communication
  - Methods of delivery
  - Who is responsible for each type of communication?

d. Change impact analysis - Can help overcome resistance to change caused by the new software and resulting change in roles, business practices and policies

e. Training plan
- Technical training needed to implement the software
- Functional, end-user and management training
- Teamwork or leadership development needed to carry out the project successfully

f. Scope management - Documents and details the steps to approve changes in the project scope that may be proposed during implementation

g. Metrics tracking and reporting - A process that will provide feedback on a weekly basis on progress against the schedule; feedback on a monthly basis against the budget - usually done in an easy-to-read metrics dashboard summary format

VI. Implementation – "Working the Plan"

a. This is by far the most arduous and tedious portion of the project and will likely take the most time.
- Characteristics of successful implementation
- Good communication
- Management of stakeholder expectations
- Sufficient budget
- Adequate staffing
- Functional ownership of the project
- Sound relationship with technology partners

- Professional project management - without a doubt one of the most important decisions on an ERP project; project managers must be highly skilled, organized, timely and have the ability to work with management, multiple departments and many different technologies

VII.   Post Implementation Assessment - Where are we now?

a. "Lessons learned" sessions - Decide what went well and what could have been better; this process can improve subsequent projects.
b. Formal assessment of how project objectives were carried out; satisfaction ratings of users, degree of expectation met by users, extent to which productivity and service objectives were achieved, degree of improvement in the quality and availability of management data from the new system, etc. This step helps bring closure to the issues that provided the rationale, purpose and direction for the overall project.
c. After some time has elapsed check the extent of user awareness of the functionality available to them. This is a fit-gap between features available and features being used and gains in productivity can be made by addressing these gaps with users and providing training accordingly.

We know there's a better way for you to do business – let us share it with you.
We can offer high-value services that fit any budget.

Call, email or tweet us to start the conversation.

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