

Looking to Implement an ERP?

# Guide to a Successful ERP Strategy



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“The single biggest failure point for **ERP implementation** is the need for change management.” *Neville Turbet, Project Perfect*

- — MAKE SURE YOUR **TEAM** IS ON BOARD
- — **STRUCTURE** THE PROJECT PROPERLY AND DEFINE ROLES
- — CAREFULLY SELECT THE APPROPRIATE **ERP SOLUTION**
- — MIGRATE YOUR **DATA**
- — CONFIGURE YOUR **ERP SYSTEM**
- — **TEST** AND MAKE SURE THE SYSTEM IS WORKING
- — IDENTIFY LEARNING NEEDS AND CREATE A CUSTOMIZED **TRAINING PROGRAMME**
- — GO **LIVE!**
- — DETERMINE, ADDRESS, AND NEUTRALIZE ANY **UNEXPECTED EFFECTS**
- — **WORTH** THE INVESTMENT?

Many developing organizations downplay the value of spending money on software and hardware for business technology. As a result, most firms continue using their legacy ERP software or simple accounting system until a change is necessary.

For businesses to thrive, their Enterprise resource planning (ERP) solutions must be of the highest caliber. A proper ERP system enables a seamless exchange of information between various departments and functions, effectively streamlining corporate procedures.

Moreover, an efficient ERP solution often covers many complex end-to-end business processes, including finance and operation, human resources, customer engagement, marketing, and more. According to statistics, 95% of organizations that implemented ERP saw improved organizational efficiency.

However, firms must take a few significant steps when switching to a new ERP system. The effectiveness of a project may be adversely affected if team members are not properly prepared for an ERP deployment. That's why you need a foolproof strategy for your ERP implementation to be successful. Here are a few essential steps you can follow to ensure a smooth ERP implementation:

## 1. MAKE SURE YOUR TEAM IS ON BOARD

Before starting your implementation journey, it's important to communicate clearly with your team so they can support your vision. To do that, the team needs to know why the shift is required, the objectives behind it, and the drawbacks of not implementing it.

That's why managers must clearly illustrate how the organization will profit from this project and define the necessity for change.

Moreover, to prevent the project from stalling, you need to be clear about the budget and resources required to support it. It would also help ensure resource availability from the get-go, so there are no hurdles later.

## 2. STRUCTURE THE PROJECT PROPERLY AND DEFINE ROLES

Once all the stakeholders are on the same page, defining roles is of utmost importance. Your team should have a clearly defined and communicated project structure to prevent duplication of efforts or failure to complete crucial tasks.

A project kick-off meeting can be a useful approach to establish expectations, define roles and duties, foster teamwork, and provide an opportunity for questions to be addressed. To ensure awareness and involvement right away, the project sponsor should also be there.

As a result, you will be able to communicate responsibilities and eliminate any lack of clarity that can cause confusion and problems during the implementation.

## 3. CAREFULLY SELECT THE APPROPRIATE ERP SOLUTION

The most important decision you need to make when kickstarting your ERP implementation is choosing the right software. Not all ERP solutions will provide you with the same advantages, and what has proven useful for someone else might not be the ideal option for your particular business needs.

As a project manager, you would need to consider your company's goals and objectives, the industry you are in, and your technical needs before making this decision.

You need to ask questions like: Will a cloud solution perform better for my company, or do we require an on-premise system? A knowledgeable ERP consultant should be able to guide you about all the issues and help you make the best selection.

#### 4. MIGRATE YOUR DATA

Migrating data into a single integrated system is a common component of ERP implementation, which makes it easier to search for and extract the information you need. Customers and suppliers depend on data continuity and integrity, and a centralized data hub with easy access to every department and business function is necessary.

It's better to filter and remove all inaccurate data before transferring it to your new ERP system, so it only contains accurate information. This way, data migration can help you optimize your processes and serve as a vital step in your ERP journey.

#### 5. CONFIGURE YOUR ERP SYSTEM

Setting choices in an ERP system is the essence of configuration. However, this approach can be challenging due to the abundance of possibilities.

Before trying any configuration, you must have a deep technical understanding of a particular ERP system. Additionally, it is essential to arrange present features to meet the system's needs.

Since most decisions cannot be changed once made, setting up your initial configuration demands caution. The good news is that you can change these decisions as your company evolves.

Examples of ERP configuration include:

- Establishing roles and hierarchies based on access restrictions.
- Choosing a preferred language and time zone.
- Drafting a default email template for clients.
- Establishing page layout.

To make the configuration easier and faster, a reputable vendor will conduct their research and take the time to analyze your requirements before implementation.

#### 6. TEST AND MAKE SURE THE SYSTEM IS WORKING

After configuring your selected ERP system, you should enter a testing phase to ensure everything is operating properly.

Testing is an essential step in the ERP deployment process because it will provide you with a thorough understanding of the system's functioning and aid in a seamless transition.

Therefore, ensure you never go live without good design and user acceptance testing.

## 7. IDENTIFY LEARNING NEEDS AND CREATE A CUSTOMIZED TRAINING PROGRAMME

Your employees must be ready for change and the new ways of working for your ERP solution need to be accepted and adopted. To equip current employees with what they need before undergoing training on the new system, you must first evaluate their level of computer proficiency.

It is preferable to choose a training plan based on the current requirements of employee groups and previous organizational training methods. You can modify the training program to best match the demands of end users by understanding the type of training that the company finds to be the most effective.

Providing role-based training to end users so they can function well in the new environment is a terrific method to assure productivity.

## 8. GO LIVE!

After employee training, it's time to go live and integrate your tasks and resources to streamline your business processes. Finally, to ensure the system is operating at its best, you should test it again.

Don't make the error of assuming that your ERP implementation is complete. You must continually improve the ERP implementation process if you want it to be truly successful. You can't just put the software in place, train your staff, and stop thinking about it.

The project's success depends on ensuring that end users are confident and at ease using the new ERP solution and that high-quality, efficient post-go-live support is provided.

## 9. DETERMINE, ADDRESS, AND NEUTRALIZE ANY UNEXPECTED EFFECTS

Like in any other project, you will face some post-live impacts; thus, managing expectations when going live is important. Let end users know that while there may be a few problems, the project team is prepared to handle any difficulties.

You'll never get everything flawless the first time, so giving people the impression that you can address problems as they arise encourages them to report concerns and even offer solutions.

Additionally, you should point out areas for ongoing improvement and let end users know you're constantly seeking to improve the product.

## 10. WORTH THE INVESTMENT?

One of the best choices you can make is to use an ERP solution in your company. Even though it demands a lot of time and careful planning, shifting to a new system will greatly help you in the long term.

We hope you can implement the suggestions in this guide to enhance your company's decision-making, effectively coordinate business operations and boost your workforce's efficiency. Best of luck!





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