Ensuring Success With Your New ERP System

Implementing a new ERP system is one of the largest internal projects your firm can undertake. The success or failure of the system can depend heavily on the implementation. To ensure success, carefully evaluate the software vendors, looking for a track record of successful deployments or red flags. This document outlines seven guidelines and corresponding questions to consider during the selection process.

### Make the Implementation Process Part of the Purchase Decision

Troubled implementations can have significant long term costs in the form of additional consulting, support and lost time spent resolving issues. To avoid these risks ask the provider for at least five references from firms similar to yours that have gone through the same implementation process proposed by the vendor.

Questions to ask references:
- Describe any positive or negative experiences that stood out during the implementation process.
- How much of the implementation was a Do-It-Yourself approach through generic videos?
- Were you able to improve your business processes through the implementation?
- Did you have to pay for additional services and support during the implementation process?

### Involve the Executive Team

One trademark of firms that have successfully implemented ERP software is executive involvement. Executives don't have to spend a lot of time, but they do need to define the implementation goals and empower staff to prioritize the work necessary to complete the implementation.

**Questions to consider for your executive team:**
- What existing business processes or metrics are critical to keep/change?
- Who are your internal implementation team leaders?
- Does your team have the resources in place to implement new software?

### Invest in Training

When using the system, poorly trained users may make mistakes that ripple through the accounting system and cause long term problems including a lack of confidence in the quality of your data. Many times, poorly trained users stem from a reliance on generic video based training instead of instructor/consultant taught. A dedicated consultant will vary the pace of instruction and give your team the attention they need in critical areas.
The goal should be to first understand what the ongoing relationship with the vendor will be like, then to determine if the software has the necessary functionality that will improve your daily processes.

Questions to ask the software provider about training:
• Do they have experience with the specific process and information needs of your firm?
• How much of the implementation is spent with a consultant vs. generic video based training?
• Can the consultant travel to your office to provide training in person?

Have a Data Migration Strategy
If the quality of the data is less than 100% accurate in the old system, moving it over frequently creates more problems than it solves. A best practice is to take a measured approach to data migration. Having access to a dedicated consultant will expedite determining the best course of action.

Questions to ask yourself about data migration:
• How do you plan to use historical data in the new system?
• Are there data integrity issues in the old system that could cause problems in your new one?
• Could access to the old system meet your needs for historical data mining?

Re-evaluate your Business Processes
The most successful firms use the implementation process to re-evaluate their business processes. When evaluating which ERP solution is right for you, consider a goal beyond just mirroring your existing system. Look for the tools and business intelligence to move your firm forward.

Questions to consider when evaluating your existing business processes:
• How many steps are involved in various processes and accessing critical reports?
• Are existing process considered easy because they have become routine?
• How many staff members are required to manage existing processes?

Engage your Project Managers
While improved accounting is great, many of the breakthrough benefits of an A/E ERP system are achieved when the project managers at the firm actually use the system to manage the financial aspects of a project. The challenge is that all A/E ERP systems look good in regards to project management adoption in a demo scenario. The only way to assess a software’s practical use is to talk to multiple customer references.

Questions to ask references about project manager adoption:
• Are the project managers using the software?
• How would your project managers rate the software?
• Does the software provider offer ongoing classroom training for Project Management?

Focus on Immediate Access to Actionable Data
ERP systems can transform an A/E firm by providing business insight that was not available before. As a prospective buyer, you should ask questions about the flexibility of the software to create custom reports tailored to the way your firm does business and based on the specific individual or role.
When you are finished, ideally you will be able to answer 'yes' to the following questions:

• Does your management team have the information they need to manage their responsibilities effectively?

• Is your team able to run the reports they need when they need them?

• Does your team have access to the information they need anytime and anywhere they may need it?

Conclusion

Firms undertake ERP implementations infrequently and doing so can be a daunting task fraught with challenges. Adopting the hard earned lessons from successful implementations and asking the questions outlined above can improve the probability of success and make the journey to positive business transformation much easier.

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