

CHAPTER 5

ACTION AND REACTION STEPS

PRE-PLANNING FOR INEVITABLE TRANSITION CHALLENGES



Having an implementation consultant with a well-tested general project management map, customised for your specific needs, is part of what is needed for a positive transition to your new ERP solution. But this is only part of the picture.

MAKING THE IMPLEMENTATION PLAN WORK FROM START TO FINISH



A simplified ERP / CRM implementation plan might serve as the basic guide for the project managers, ERP implementation consultants and you - the customer. Note the elements of the project plan:

- Planned start date of activity,
- A description of each activity,
- The hours allocated to each activity,
- The status (started, in progress etc.),
- The customer time allocated to each activity,
- The role of the customer in each activity,
- Who has responsibility for each activity and a general comments section.

It is important that the project plan is updated, tested, and verified.



Cost Controls for Implementation

A major consideration for any size company implementing a new ERP or CRM system is control over the costs associated with implementing the new system. How do we ensure that what is quoted is what we get invoiced? Here are a few hints and tips to help:



FIXED PRICE VS "DO AND CHARGE"



SCOPE OF WORKS



WHO TAKES RESPONSIBILITY FOR WHICH PARTS OF THE SYSTEM



BE CAREFUL OF DATA, REPORTING, AND DEVELOPMENT

RESOLVING CONFLICTS, TRANSITION CHALLENGES, AND ERRORS



The first step for successful problem resolution is expecting problems and planning for them. Problems are usually in one of three categories.

Problem description code:



1. OPERATIONAL ISSUE - CRITICAL:

An operational task such as the receipting of stock into the warehouse cannot be completed. This would be considered an urgent operational issue as it is preventing your business from carrying out day to day functions.



2. OPERATIONAL ISSUE - NOT EFFECTING CRITICAL OPERATIONS:

Though the system is functioning, there are either training challenges, or the system is not operating as expected, as quickly as expected, or the data appears incomplete. This sort of issue does not require immediate response but you would want the issues resolved in a timely manner.



3. SUGGESTED IMPROVEMENTS:

The system is working as planned, but the users have a recommendation for improving the system.

SUMMARY

A well supported company project manager coordinating efforts with an experienced solution provider and validated software applications form the foundation of a successful ERP / CRM transition. The company project manager, along with departmental input, can help reduce the overall services cost for implementation. A problem resolution framework prevents small challenges from becoming mission critical problems.