



### Part III: The Challenges of Implementing an Enterprise Resource Planning (ERP) Software System: They are Worth It!

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For most small businesses change is difficult! OK, for most individuals change is not easy to handle. We get use to our patterns, set in our ways, don't we? No matter how much we are told the change will be positive, we tend to resist it until we see the positive results for ourselves. Then, wow! We embrace it! We have the epiphany! The magical moment! That mountain top experience!

Welcome to the wonderful world of software! You will not understand the power it has to offer until you experience it and then you will be amazed by it. However, to experience this journey you will need to grow. To grow you will need to leave your comfort zone; everything you are used to and makes you feel safe. Don't worry, as soon as you build new skills you will feel safe once again!

Software and implementation is similar to group dynamics and the importance of feeling excepted, safe, recognized and a sense of belonging. In software you want to feel trained enough to do your job, so you can perform well. Understanding the software will allow you to add value and enhance your skillset to open your value-add to your organization. You do not want to be intimidated by the software, afraid to use the software or spend hours to do a simple task. During the migration you will want to reward, embrace and positively reinforce team members for learning new skills. This is where selecting the right implementation team and strategy for your organization is important!

Engaging a third-party consultant or employee for your company who specializes in the ERP software selected, besides the ERP's company's implementation team, is recommended. This individual would be employed (or engaged) by your company and therefore work and report to your company. This individual would help coordinate events between your company and the ERP company's implementation team. This extra investment will be very valuable during the entire implementation period (planning phase, the "go live" and post-implementation period). Additionally, you will have a professional to contact who is intimate with your ERP system after the implementation period. This would be very valuable for your company to have, especially within the first year of the "go live" date.

This individual would be able to help construct workflows and marketing plans in additional to all other aspects of the "go live" process. This will allow your team to have greater functionality of the ERP during the "go live" process period.



## A few of the lessons learned during implementing an ERP system

### Lesson 1: Your Company Has New Policies and Procedures

When you purchase an ERP, neither the salesperson or consultant will tell you (directly) that the software you just purchase redesigned your company's policies and procedures, and perhaps culture.

A small business has a lot of personality, flexibility and spunk, especially in the early years. When implementing an out-of-the-box system-wide ERP with pre-defined roles, your team members might feel as if you have "gone corporate" on them. Team members who are used to be able to see all sorts of information in the old system now cannot. When you explain to them that it is for internal controls, better efficiency, more focus or any other creative reasons, be prepared to receive a backlash of response!

### Lesson 2: Be Very Flexible!

I was prepared for three weeks of stress as everyone learned the new system followed by a new state of Zen. I was under the belief that it takes three weeks for humans to make a habit. I believed three weeks from the "go live" date our company would be in its "new habit" and moving along right before our busy season began. The third week may have been the hardest--the team began becoming comfortable with the ERP system and increasing the demand of changes.

Additionally, at week three our life boat, the old system, was out of sight! I knew there was no turning back and my workload was only increasing. I later was informed that the general adaption period is three months, not three weeks, for most companies. Be prepared for a three-month cycle after your "go live" date for continuous updates to the ERP system.

### Lesson 3: Scheduling During "Go Live"

Be mindful of your scheduling during the implementation period. I was also faced with catching up on the traditional responsibilities and a work trip. Managers and staff should not schedule any non-essential trips during the pre-launch and implementation period.

### Lesson 4: Testing Is Critical

The testing phase before going live is crucial. The company was trying to conduct testing and training for the ERP during its offseason. However, the company was faced with several



challenges. The staff reported they were busier than normal, and the company was relying on the old system. At this point, it was becoming more apparent the old system wasn't going to be able to support us into the future. During the testing phase is when you customize the processes, roles, and forms for your company and, as one consultant stated, "find the problems and try to break it." If you do not take the time to test your ERP appropriately, you will compound the stresses and change requirements during the "go live" implementation.

### Lesson 5: Training Is Critical

Team training and talk-through sessions are vital. The team will need encouragement, positive reinforcement, goals, rewards, and time to learn the new system. I found that the training is mostly videos. Be prepared to watch 16-60 hours of videos depending on your role. Intertwined in the videos are exercises in order to have some interactions with the software. Nothing truly beats real life experience! And with that comes mulligans, do-overs, change-orders, edits, and the delete button, especially during the first week. Everyone in your organization needs to be prepared to take deep breathes and have an extra dose of patience and grace. This tone, plus some excitement, can be best set from the top of the organization.

Tip: Allow your marketing team to complete the basic training early in the process. Then they can then begin to create templates and conduct testing as well as advance training on the ERP system. This will allow the marketing team to be prepared for marketing campaigns using the ERP system on the "go live" date.

### Lesson 6: Best Practices

Understand the best practices the ERP your company selected offers. How do these best practices affect, intersect or will change your current practices? What policies and procedures will need to be updated as well as communicated? Be prepared to spend time with staff to talk through before implementing for feedback and comments.

### Conclusion

In conclusion, moving from a traditional accounting system to an ERP has been an amazing and unique challenge! The company has been able to get its first real time data streams, which it is using in a variety of ways including order management, sales and marketing. The data from the ERP is our company's competitive advantage.



I have uncovered an exciting new technology passion in my life! I now realize how amazing and available technology is as well as how it can affect a growing business. Is your company ready to upgrade and adapt? I bet your competition is!