10 stages of ERP implementation

Enterprise resource planning (ERP) software integrates the data and functions of multiple systems under a single platform. It's a significant investment – plan and prepare so you can maximize your return on investment (ROI) by improving operations and making more informed decisions.

1 Scope business requirements

Involve key stakeholders in discovery meetings to identify:

- Goals and KPIs for success
- Potential risks

TIP: *Don't underestimate the complexity of implementing an ERP system. Identify either an internal employee or an external consultant to serve as your project manager.*

2 Source and select ERP software

You want to look for a system that:

- Can scale with your needs
- Is compatible with your industry and business

TIP: *A consultant who understands both your business needs and the ERP software landscape can help you plan for the total cost of ownership and choose a vendor who will focus on your needs.*

3 Inform system design

ERP software should be designed to achieve your company's goals and incorporate business elements such as:

- Existing or desired business workflows
- Corporate structure
- Relevant data sources

TIP: *Successful design requires knowledge of ERP software, your business and your business processes. An ERP consultant can act as a "translator" between you and the software vendor.*

4 Configuration and development

Your ERP vendor:

- Configures – and, if needed, customizes – the software to align with your requirements and processes
- Develops integrations with other systems and data sources

TIP: *Your software vendor will need someone with knowledge of your business, processes and desired outcomes to answer questions during the development stage.*

5 Data migration

ERP systems require clean, quality current data from other systems, and you must decide:

- Which data to import
- How far back to go with importing historical data
- Whether and how data needs to be cleaned up, validated or transformed

TIP: *Your system will only be as good as your data. Be prepared to address any data hygiene issues with your internal team or with help from a consultant. Better quality data can enable better planning and real-time decision-making.*

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Validate the system

Check that your ERP solution:

- Operates as intended and produces accurate results
- Complies with industry-regulated processes and documentation

TIP: *If the system isn't functioning as described in your scope and design requirements, conduct a gap analysis and present it to the ERP vendor. A consultant can help with this.*

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Train users

As you prepare to launch your ERP, you need to:

- Train users on the system and any new processes

TIP: *Consider requiring mandatory training for all users.*

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Test the system

Test and evaluate the system's full capabilities, including:

- Automation processes and workflows
- System security
- Run parallel systems as a temporary redundancy

TIP: *During this phase, gather feedback from users so the vendor can make any needed adjustments before going live.*

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Go live!

Congrats! Your ERP system is officially ready to launch. At this stage you may need to:

- Communicate internally and externally about the changes
- Resolve any additional issues that arise

TIP: *Expect to encounter some issues when you go live, and have plans in place to deal with potential disruptions. A consultant can provide 'day-of' assistance to help facilitate the launch.*

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Post-implementation

Getting the most out of ERP software requires ongoing work, including:

- Measuring ROI over the long term
- Continually optimizing system configuration
- Considering the value of potential add-ons, additional modules or new features

TIP: *Many businesses need outside assistance to maximize their ERP system and fully realize its value.*

Consider working with a professional

If you're thinking about implementing an enterprise resource planning system, contact a member of Kaufman Rossin's Business Consulting Services practice today to learn how we can make the process smoother, saving you time, expanding your capacity and helping you to maximize your ROI.

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