



10 Key Things to Consider When Converting ERP Systems

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People

Systems

Time

Budget



Bring them all together

To deliver

A successful implementation



What does it take?

How long will it take?

Who needs to be involved?



Reasons for Converting ERP Systems

- Older system
- Older software version
- Re-implementation
- Acquiring new divisions



Implementation Scope

Influences

Implementation Timing

4-6 months

To

2-3 years



Project Management Strategies

Conversion Risks (scope / delays / budget) can be minimized using proven project management methodologies

- **Planning – time spent planning reduces time spent revisiting the same topics**
- **Milestones – identify achievable milestones for the project team; hold them to it**
- **Timelines – make the timelines known to all involved**
- **Requirements – identify and document business requirements before trying to resolve issues or design solutions**
- **Scope – manage in/out of scope, future phases, avoid scope creep**
- **Resource management - define roles and responsibilities; assign tasks; communicate responsibilities and tasks; manage accountability**
- **Agendas and Minutes – keep the meetings focused; communicate objectives; communicate meeting decisions, issues and tasks**



Conversion Requirements Analysis

- **Are there internal resources to support the conversion?**
- **Can you anticipate the nature of the conversion politics?**
- **Will external systems or interfaces be affected?**
- **Will there be requirements for new hardware or infrastructure changes?**
- **What is the level of expertise within the organization on the new ERP system?**
- **Will you implement all the modules at once or will you use a phased approach?**
- **What is the timing of the go-live in relationship to business cycles?**
- **How will reporting and information sharing be impacted?**
- **Document your decisions**



Impact on Business Processes

- **Review current processes and document**
- **Explore future processes and document**
- **Identify features and functionality in the ERP application that can improve processes (do away with manual steps)**
- **Leverage new ERP system features and functionality; don't create the "old" system**
- **Incorporate known process changes into training**
- **Do not implement too much at once (EDI, web reporting . . .)**
- **What new tools will be available (ODBC, sharing data . . .)**



Pilot Testing

- **A good pilot test encompasses**
 - **Cross functional testing of new functionality and any new processes**
 - **Cross functional team**
- **Use data that is similar to production data**
- **Maintain issues log and develop action plan to address issues**
- **Use this as an opportunity to test process improvements**
- **Leverage power users to support buy-in**
- **Get a sign-offs for each functional area**



Pilot Testing

(continued)

- Develop use cases that will guide the testing process
- Follow the flow of a transaction through Each Module that you plan to implement
- Test standard reports and evaluate reporting requirements
- Test custom interfaces, if applicable
- Document the results of pilot testing – you may need it in the future as a reference



Training

■ Application

- Involve the power users who participated in pilot testing
- Let users become familiar with the new application
- Include known process changes
- Incorporate the why and how of process changes
- Use recent data for training

■ Information Sharing

- Identify currently used reports and how they are accessed
- Which reports are critical for operations or financial reporting?
- Can Finance use the new set of reports for reconciliations?
- Test, then test some more

■ System Management

- If a new set of skills will be introduced, conduct Admin training > Application, Database, special functions (EDI . . .)
- Conduct development training if in-house resources are available



Data Conversion/Migration

- Data migration and translation requirements
 - Map old field(s) to new field(s)
 - Populate new data fields
 - Merge data from separate fields
 - Separate data into separate fields
- What will be converted and what will be manually entered (this should tie back to your conversion requirements analysis)
 - Purchase / Sales Orders
 - Accounts Payable / Receivable
 - Work Orders
 - Projects



Data Conversion/Migration

(Continued)

- Historical records
 - Where will they live?
 - Existing application
 - New application
 - Data warehouse
 - How much history will you extract from your current application?
 - Who will need access to the ‘old’ data after the conversion?



Interfacing Disparate Systems

- Does the current application share data with other applications?
- Will this requirement continue?
- Who will create specifications for the interfaces and who will develop the interfaces?
- At what point in the conversion do the Interfaces need to be ready?



Migrating Disparate Data TO the New ERP Application

- Are there other data sources that contain vital information?
- Are there Excel spreadsheets or other outside sources where data lives that can be incorporated into the new application?
- Does the new ERP application provide functionality that can replace these databases or spreadsheets?
- Evaluate if this data can be incorporated into the data conversion phase or will it occur later?



Customizations

- Identify what application customizations exist in the current environment?
- Are the customizations being used?
- Will any of these customizations be replaced by functionality in the new application?
- Do you have an internal technical staff that will develop the customizations?
- At what point in the conversion do the Customizations need to be ready?



Conversion Tools

- Identify and compare data conversion tools
- What tools (Baan Exchange, QUIZ, etc.) are available that support your existing application?
- What tools can make the data conversion process more manageable?
- Select a conversion partner that understands data
- Your business partner for the conversion is another “conversion tool”



Choosing an Implementation Partner

- What should you expect from an implementation partner?
- How much or how little should they contribute to the overall process?
- Have they done this before?
- Check their references.
- Recruit a team that possesses tools and the experience to streamline the implementation, training and data migration processes
- Pick a solution partner that offers a full range of services and expertise



10 Key Things to Consider When Converting ERP Systems

- **Manage the Project**
- **Conversion Requirements Analysis**
- **Impact on Business Processes**
- **Pilot Testing**
- **Training**
- **Data Conversion / Migration**
- **Conversion Tools**
- **Integration of Disparate Systems**
- **Customizations**
- **Migrating Disparate Data To the new ERP application**



Strategic Systems Group (SSG) Overview

- Founded in 1991
- Long and trusted relationship with the Manman, MK and Baan customer base
- Long and active participant and associate in CAMUS and BWU users' groups
- Years of hands on experience with MK, Manman and/or Baan sites before joining SSG
- Involved in original beta implementations and related conversion efforts of Manman/X (MK)
- Proficient in Manman, Manman/X, MK, Baan, Web-based applications
- SSA-GT selected Strategic Systems Group and their tools as a primary conversion resource



Areas of Expertise

- Applications: Manman, MK, Baan IV-V-LN, Microsoft Great Plains
- Databases: MS-SQL, Oracle, Ingres, BISAM and Image
- Operating Systems: Windows, Unix, Linux, HP3000, DEC VAX
- Languages: Fortran, MK Tools, Baan Tools, .asp, Cold Fusion, Java, C, Visual Basic, Dexterity
- Development: applications and tool experts in Manman, MK, and Baan; custom processes, application enhancement
- Reporting and Business Intelligence Tools
- Web-based Applications: ERP data deployment to intranet and internet



Questions ?

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