

Checklist

14 tips on how to successfully implement an ERP project



STARIA

14 tips on how to successfully implement an ERP project

The implementation of an ERP (Enterprise Resource Planning) system is a significant project, which may be started for any number of reasons. The goal of the project can be increasing the efficiency of an organization or its processes, adding cost-efficiency, modernizing an organization's practices or improving customer satisfaction. Whatever the reason, a successful ERP implementation project requires a thorough analysis of an organization's operations and processes in advance. Early change management is important for the project to succeed, as this ensures that new practices and processes are permanently ingrained in the organization.

ERP projects can be roughly divided into four parts: internal pre-study, call for tenders, the project phase as well as the maintenance and further development phase. For the project to succeed, certain factors should be taken into account. This checklist includes the most important elements in a successful ERP project.

A 14-step checklist for a successful ERP project:

1. Internal pre-study in an organization

The internal pre-study of an ERP project is usually started by a need to increase efficiency and make changes. In this phase, it is essential to first identify the key reasons for the project. The project's goals and meters should also be specified during the internal pre-study phase. This allows for determining whether the goals have been reached at the end of the project.

In addition, the budget and schedule need to be defined and agreed, not to mention the persons participating in the project and their roles. Before starting, it should also be considered if the project affects stakeholders and how these should be accounted for. Change management is a crucial part of ERP projects and the way how people are managed towards the intended change should be planned in advance.

The following matters should be accounted for during the internal pre-study:

1. What are the project goals? What are the metrics for measuring success?
2. Determine the project budget and schedule.
3. Determine the key persons and other persons participating in the project.
4. Determine the stakeholder groups the project concerns and how they are potentially affected by it.
5. Reflect on how to manage change and how to get people committed to the project.

2. Call for tenders

After a framework for the project has been created, discussions are held possibly with several system suppliers. There are various ERP systems and choosing the most suitable system requires clear documentation on what is required from the system. There are also numerous system suppliers – finding a suitable supplier for the organization is crucial. In the tendering phase, the expertise of a system supplier compared to its competitors should be determined. It is also necessary to ensure that the supplier understands your business and the project strategy.

For a successful tendering phase, the following matters should be taken into account:

6. There are various ERP systems. Examine the options carefully and discuss with the supplier to see if the system is suitable for your sector and whether it can achieve your project goals.
7. Make sure that the supplier understands your business and knows why the project was started in the first place.



3. Project phase

When a suitable ERP system and supplier partner have been determined, it is time for the project to start. At this stage, the key persons for different business processes must be committed to the project and have sufficient time resources for a qualitative realisation of the project. The key persons also need to be able to make decisions, even if the project proceeds at a swift pace.

In addition, the persons involved in the project must be aware of the company's current business models. These business models affect the deployment of the ERP system. This is why it is essential to have process descriptions of business models to ensure that the entire project team has a common vision of the project goals.

For a successful project phase, the following matters should be accounted for:

8. By the start of the project, ensure that the persons participating in the project have the necessary time resources and that the schedule is realistic.
9. The persons participating in the Steering Group need to have the authorization to make decisions to keep up with the schedule.
10. Make sure that the partner you chose is monitoring the project and taking it forward as agreed. Steering Group meetings are a good method to monitor the project's progress. This minimizes potential risks and allows for reacting to changes in advance.
11. Process diagrams and descriptions should be complete by the start of the project to ensure that the entire project team shares a common understanding.

4. Maintenance and further development phase

The final stage of an ERP project involves transitioning into the maintenance and further development phase. In this phase, the ERP system has been deployed, and depending on the system supplier and agreement, maintenance usually involves support for 1-2 months. The purpose is to ensure the efficient deployment of the system within an organization.

The following matters are essential during the maintenance and further development phase:

12. At the end of the actual project phase or when transitioning into the maintenance phase, it is a good idea to designate the system's main users, who are responsible for its development.
13. At Staria, we prefer the train the trainer method, where the goal is to train main users, who can then train others within their organization. This ensures that the organization has people who understand the system.
14. At the end of the project, it is a good idea to return to the goals and meters. A successful ERP project also includes an analysis of the goals reached.

**Book a free consultation
on how to choose a
business platform**

Book a consultation