Recipe for a Successful ERP Implementation
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Overview: Most Finance Directors will oversee a financial software (ERP) implementation at least once in their career. There are endless vendors and consultants that claim they will make your ERP project a success, but none of them ever lay out the basic steps and practices that lead to success regardless of the vendor or implementor you select. This presentation will illustrate some basic concepts and provide examples of how Utah County utilizes them in their current ERP Project.

1. Assess need and organizational appetite for change
    a. Is our current system providing what we need now?
        i. What is working?
        ii. What is not working?
            1. Problem statement
    b. Will our current system provide what we need in five years?
        i. Sustainability
        ii. Efficiency
    c. Will your Board/CAO support it?
        i. Financially
        ii. Politically
    d. Will key stakeholders in your organization support?
        i. Will they lose or gain from a new ERP?
        ii. Will they have to give up funding or control?
2. Ensure buy-in from the Board/CAO
    a. Memo
        i. Problem statement(s)
        ii. Better place statement(s)
        iii. Cost estimates
        iv. Resource requirements for success
            1. Don't understate needs or costs
    b. Formalize Budgetary Approval
        i. Plan at least 10% contingency for change orders
    c. Get written assurance that ERP will be top priority for leadership
3. Organize a Project Team
    a. Project manager
    b. Consultants
    c. Subject Matter Experts (SMEs)
        i. Cross Departmental Pit Crews
        ii. IS/IT support

        iii. HR/Payroll
        iv. Treasurer
    d. Steering Committee
    e. RFP Evaluation Committee
4. Develop a Change Management and Communication Plan
    a. Develop a purpose statement
        i. Anticipate questions and concerns
        ii. Distribute talking points to key stakeholders
    b. Use multiple channels
        i. Email
        ii. Internal blog or website
        iii. Group meetings
        iv. Individual meetings
    c. Overcommunicate
        i. Don’t be afraid of being mocked if the message is repeated too much
5. Conduct a Process and Systems Inventory and Evaluation
    a. Document every process that feeds into a financial transaction
        i. Spreadsheets
        ii. Third party systems
        iii. Email or verbal approvals
    b. Flowchart each process for clarification and documentation
    c. Ask why each step is needed
    d. Ask consultants and providers what they recommend
6. Make Participation in the ERP Project Easy and Rewarding
    a. Create bandwidth for key employees and departments
        i. Open more permanent or temporary positions
        ii. Delegate or defer tasks
    b. Create bonuses and incentives
        i. Food at meetings
        ii. Comp time and cash bonuses for SME’s and committee members
    c. Broadcast milestones and small wins for the project and team members
    d. Be careful not to over-sale or under-deliver