Reinvigorate Your ERP System or Replace It?

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ICMA Conference Presenter

#ICMA2018

Who am I?

- Tracey Rau
- ERP Guru

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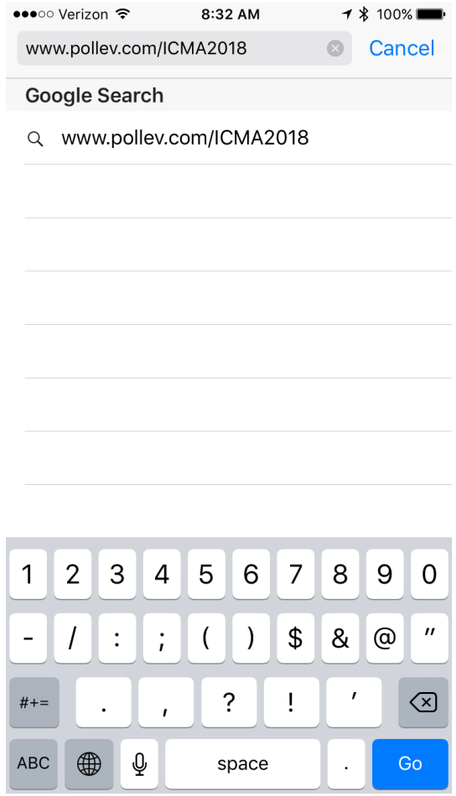
- Type in www.pollev.com/ICMA2018 in the search box to join



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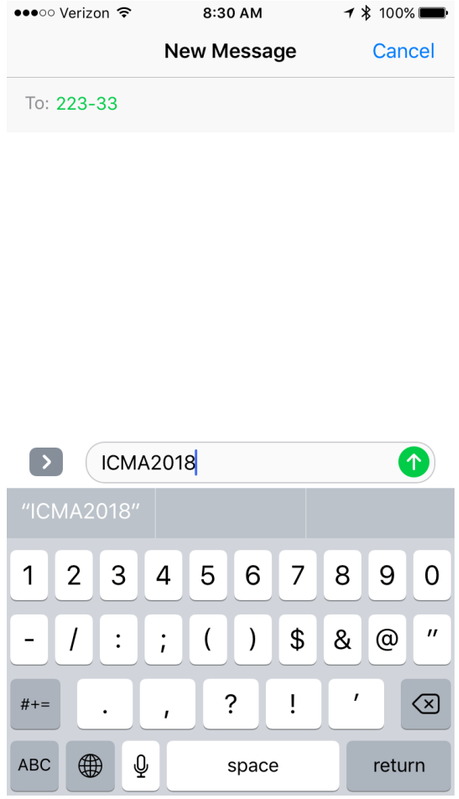

What does ERP stand for?

Environment Resource Production

Easy Reporting Product

Enterprise Resource Planning

Extremely Resourceful Products

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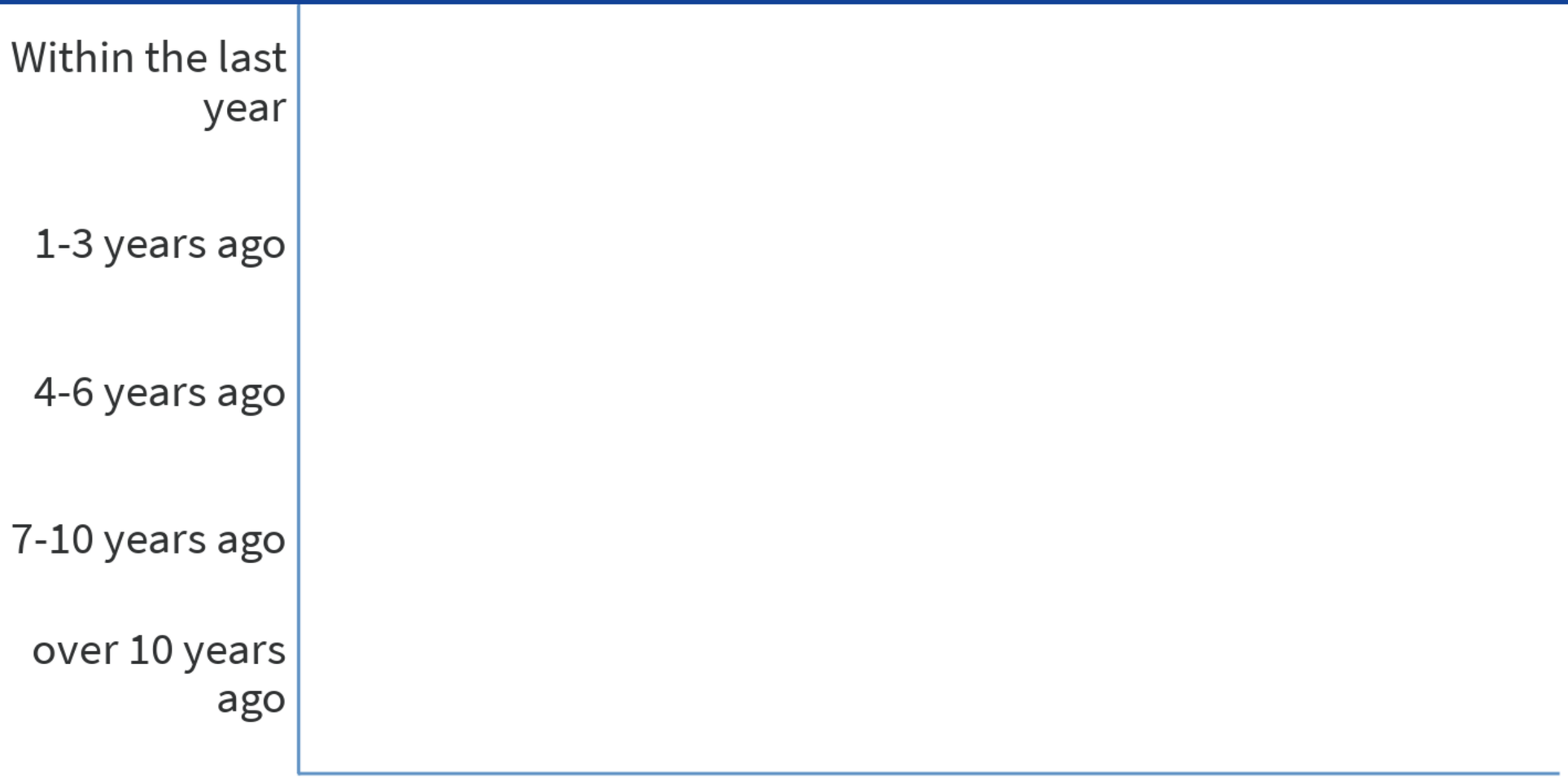
What is an ERP system?

- A suite of **integrated applications** that is used to capture, track, report and share data across an organization
- Typically this includes:
  - Financial Systems
  - Human Resource Systems
  - Revenue Systems
  - Also can extend to other areas

How long ago did you go-live with your ERP system?



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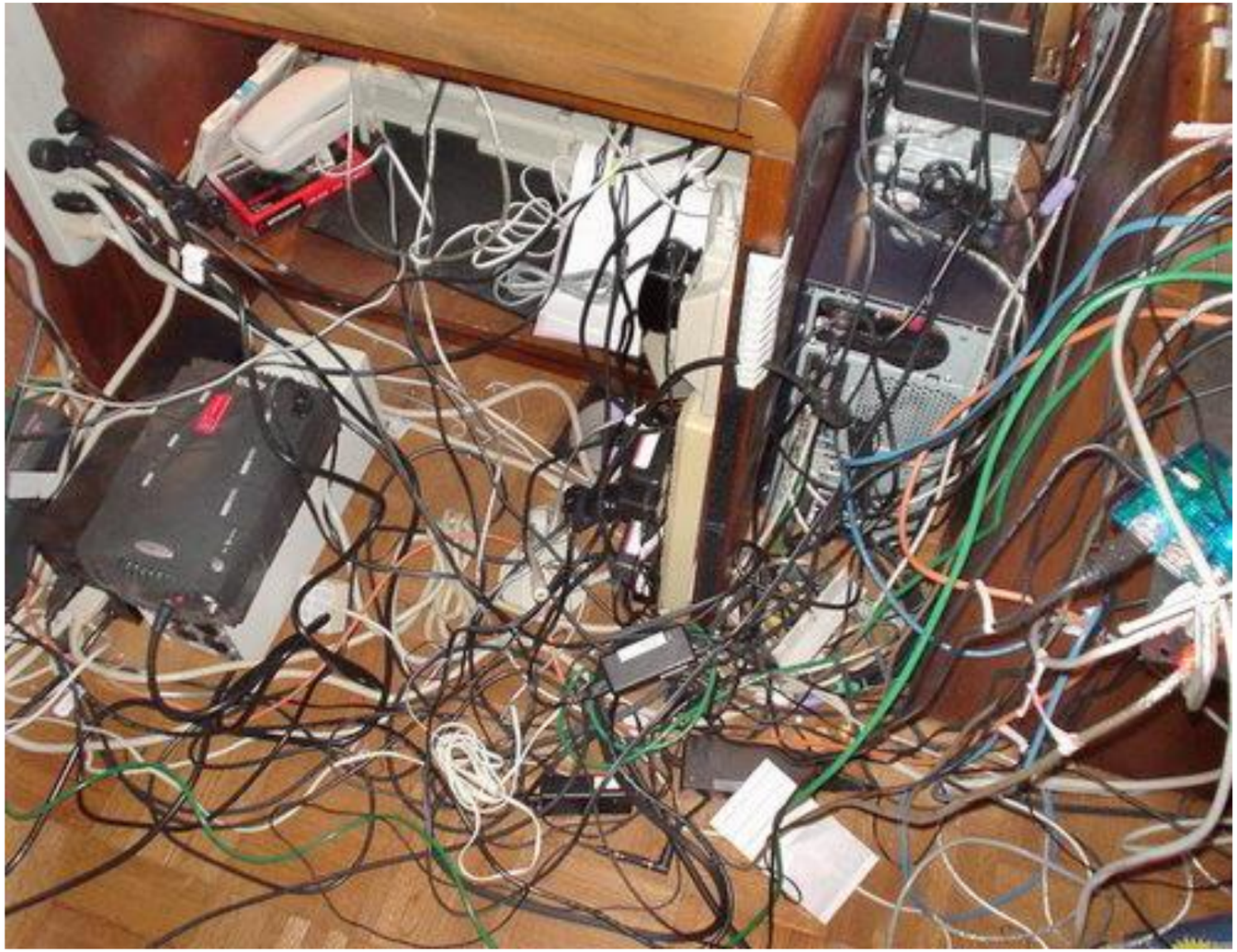
Implementation Statistics

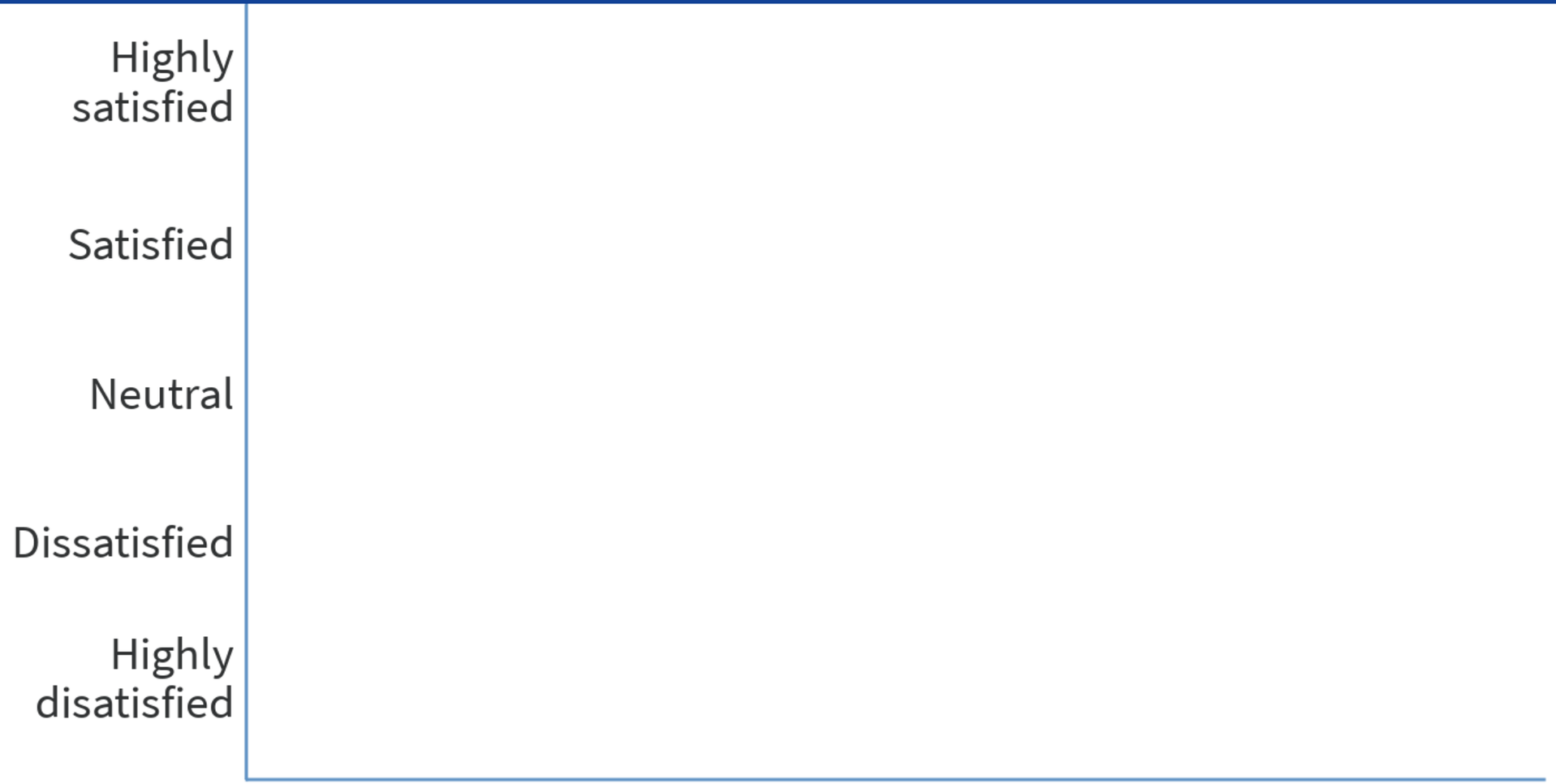
How successful? How long does it take?

Realize that a lot of organizations have the same problems (the majority)

Implementations are messy!



How satisfied are you with your ERP solution?



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Issue: Implementation wasn’t fully completed

Result

- All modules were not implemented
- Majority of features were never implemented

Reinvigorate

- Review your maintenance contract
- Review any shadow systems being used to identify gaps
- Have your vendor train staff on features and functionality not being used

Issue: Takes longer to enter data

Result

- Negative attitude toward the new system
- Process may need improvements through redesign

Reinvigorate

- Reevaluate your processes
- Is the data being entered being used for decision making?
- Need to educate the end user on why they have to enter more data

Issue: Unable to get information from the system

Result

- Custom reports never created
- Dashboard and custom inquiries never set up

Reinvigorate

- Invest in custom reporting tools and dashboard training
- Assign new role for ERP reporting and dashboards

Issue: Staff turnover

Result

- New staff struggles with the new system
- No one understands how and why the system was configured as is
- Many are frustrated and assume it is an inefficient system

Reinvigorate

- Bring in vendor to train staff
- Create an in-house core group that can train others
- Implement ERP training when onboarding

Issue: Failing partnership with vendor

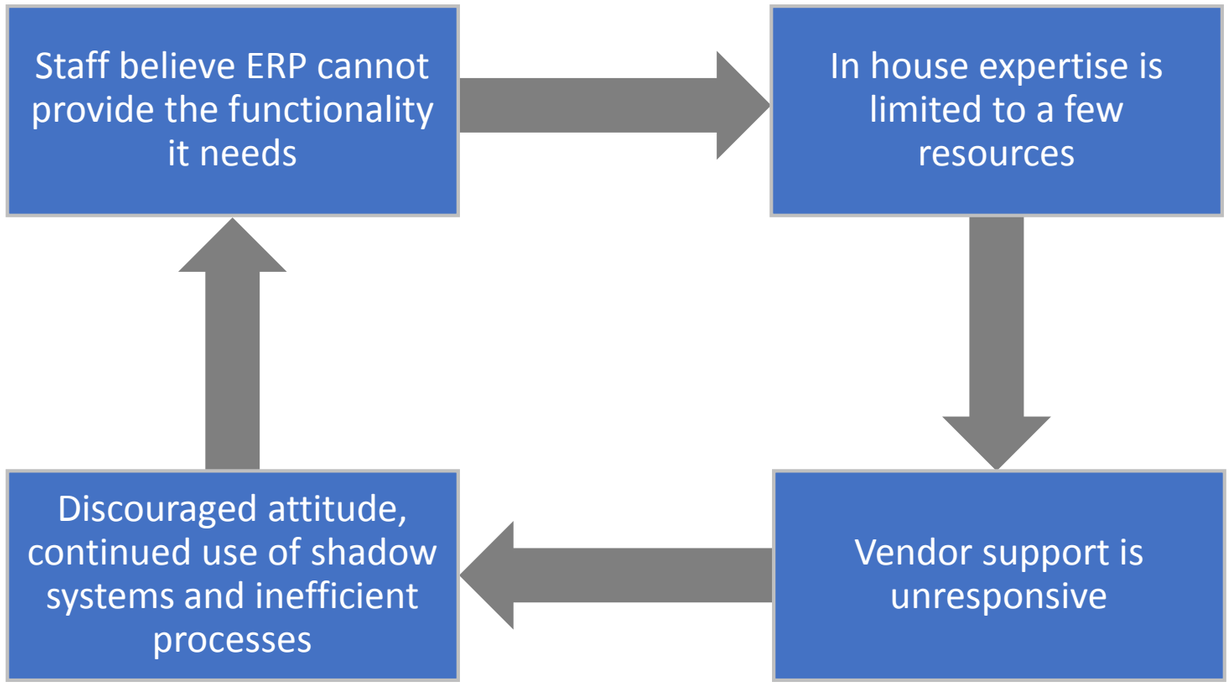
Result

- Vendor relationship is soured
- Staff is discouraged and frustrated with the vendor
- Staff wants to replace the system

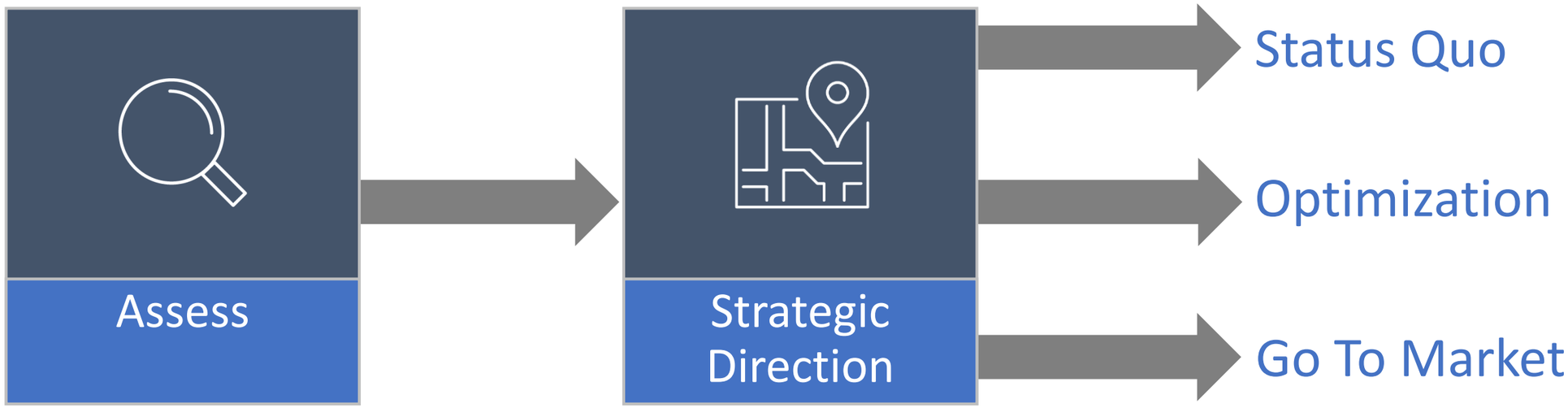
Reinvigorate

- Meet with vendor’s management team to voice concerns
- Assign an ERP point person to “bird dog” and escalate support tickets
- Attend user groups

Current Vicious Cycle



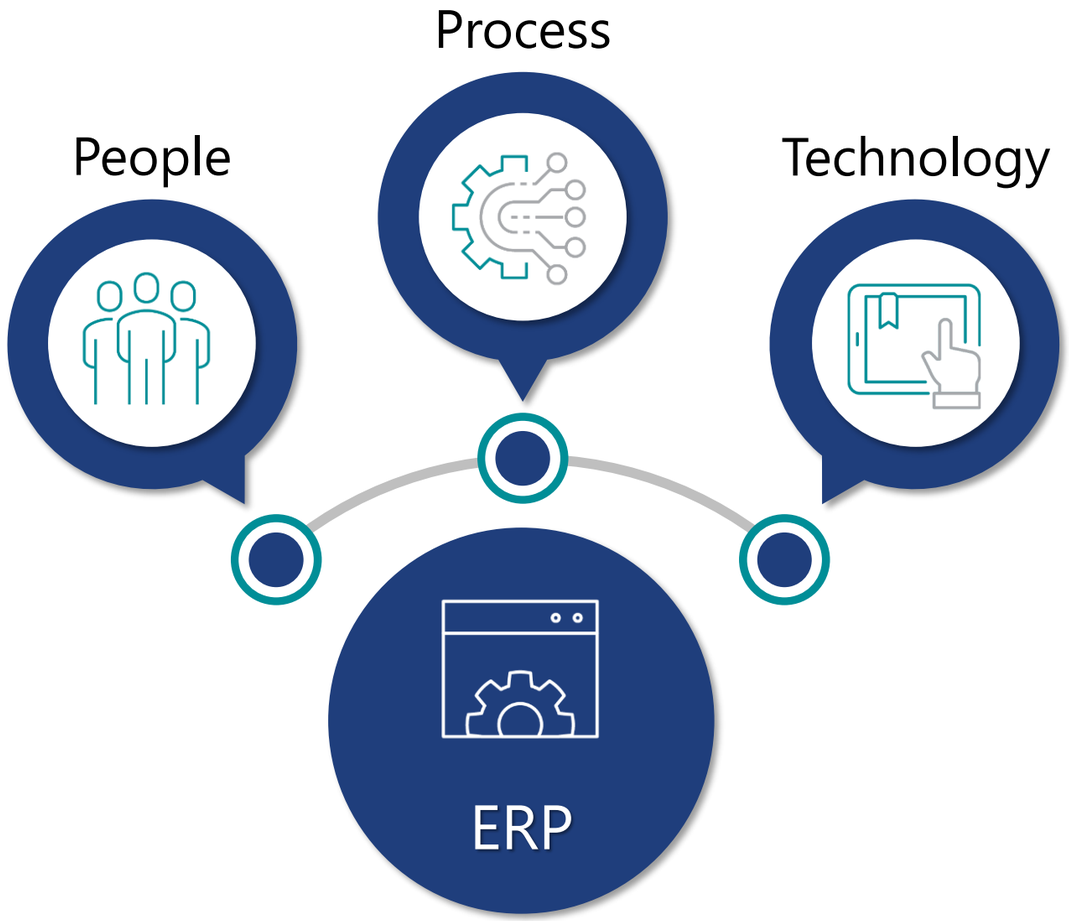
Reinvigorate or Replace?



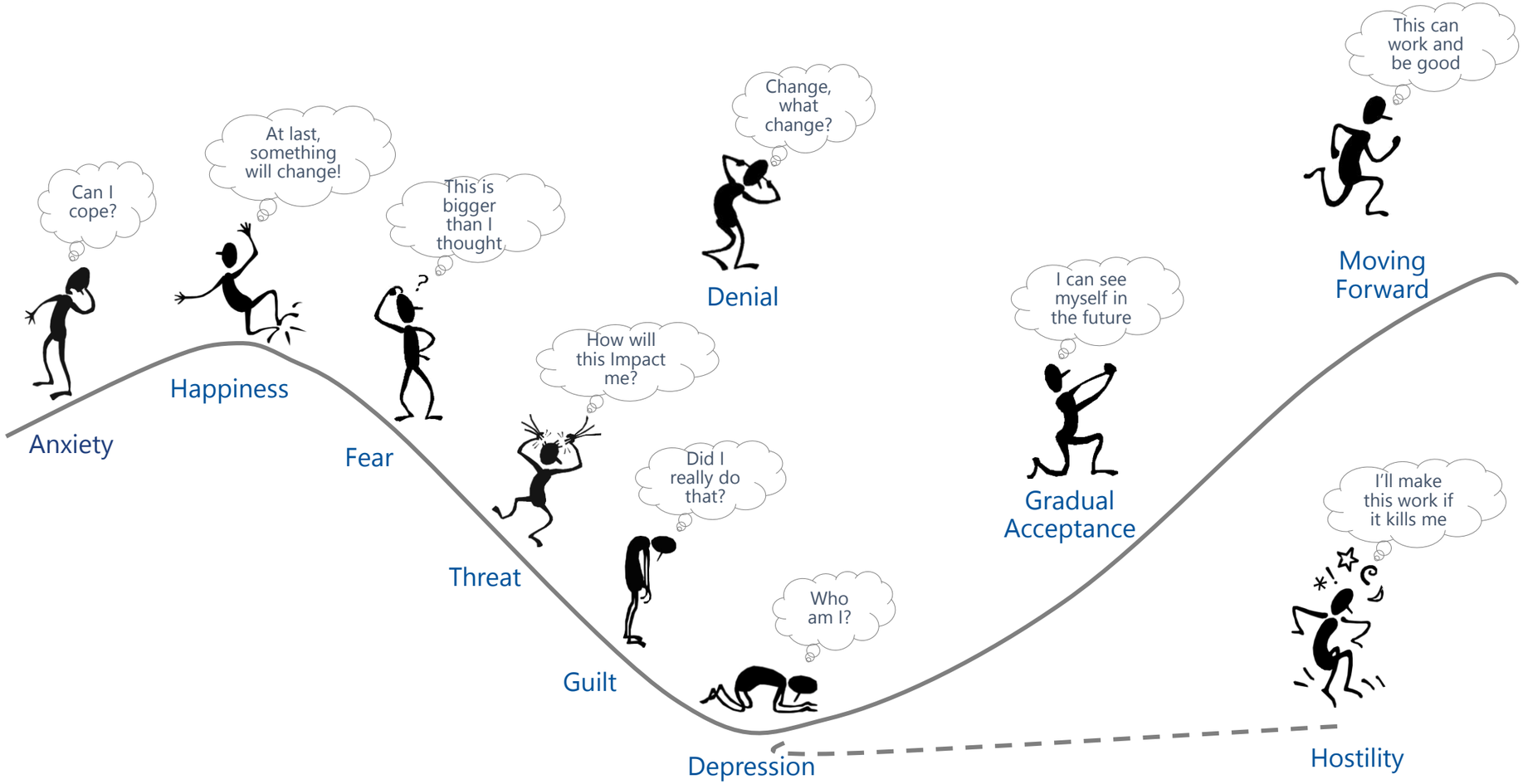
Questions to ask in your assessment

1. Is your vendor still very active in the marketplace?
2. If you are not on a current release, what are the costs to upgrade to the most recent release?
3. If you purchase a new ERP system, will you be in the same situation as you are now? What will change?

“Also” a Technology Project

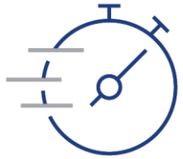


Typical of an ERP Implementation



Process Improvement Cues

Duplicated Efforts



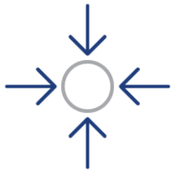
Cycle Time

Searching and Indexing

Internal Process Controls

Role Ambiguity

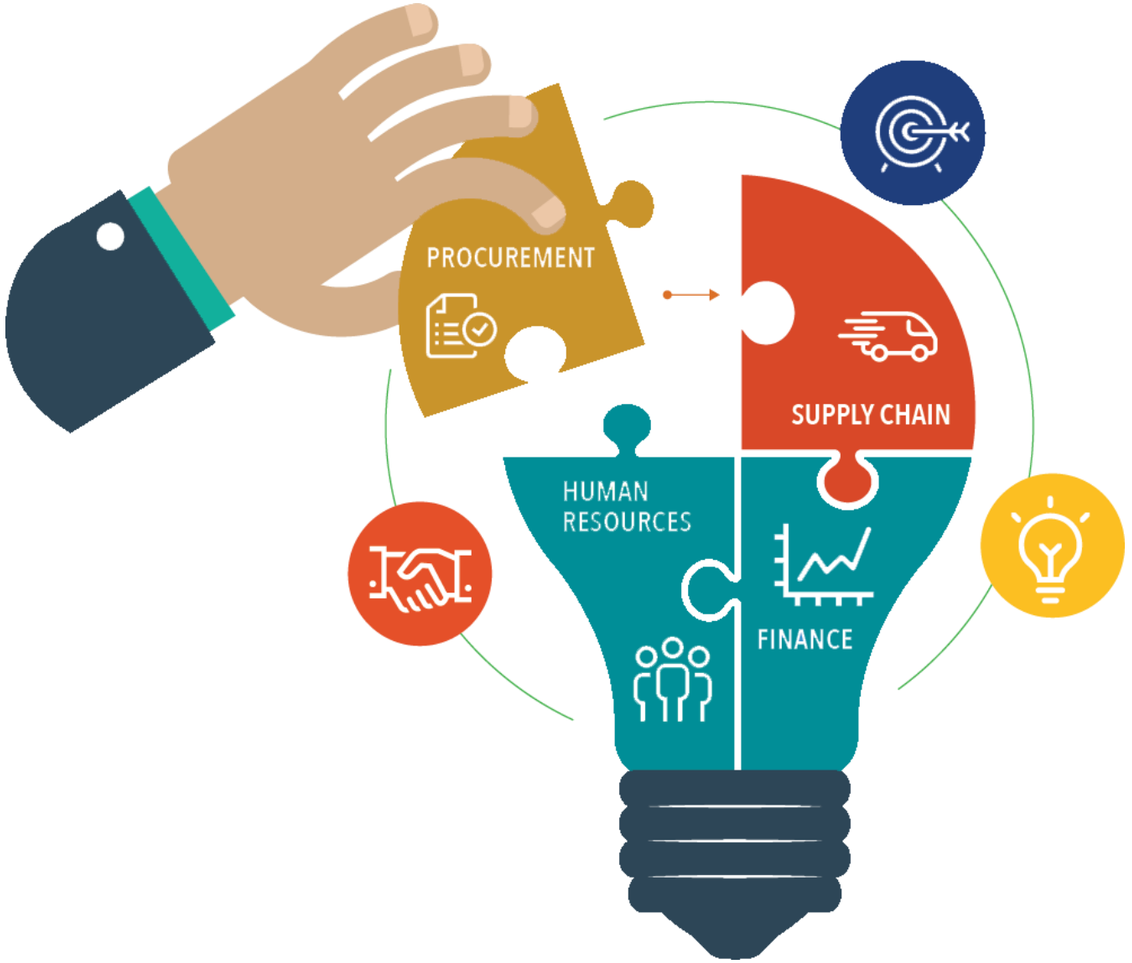
Recognize Past Practices



Multiple Sources of the Truth

Lessons Learned

- Strong governance structure
- ERP training should be built in your annual budget
- Continuously reassess processes
- Assign key roles to support the ERP system – staffing and backups
- Revisit your key performance indicators (KPIs)
- Attend users groups
- Build your vendor relationship



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