

# Reinvigorate Your ERP System or Replace It?

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#ICMA2018

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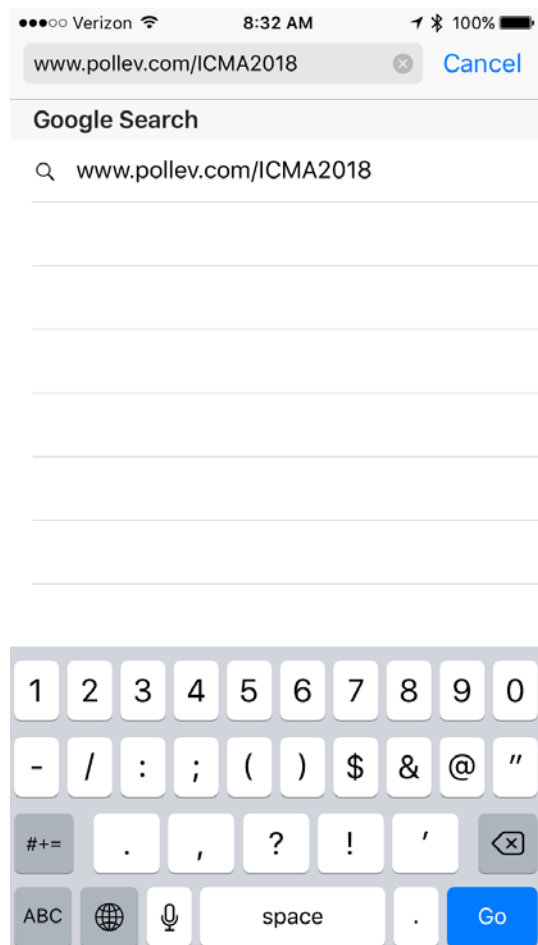


# Who am I?




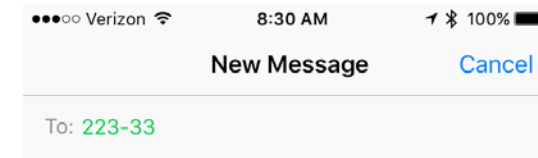
- Tracey Rau
- ERP Guru

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# What does ERP stand for?

Environment Resource  
Production

Easy Reporting  
Product

Enterprise Resource  
Planning

Extremely Resourceful  
Products

# 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?

Within the last  
year

1-3 years ago

4-6 years ago

7-10 years ago

over 10 years  
ago

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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?

- Highly satisfied
- Satisfied
- Neutral
- Dissatisfied
- Highly dissatisfied

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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

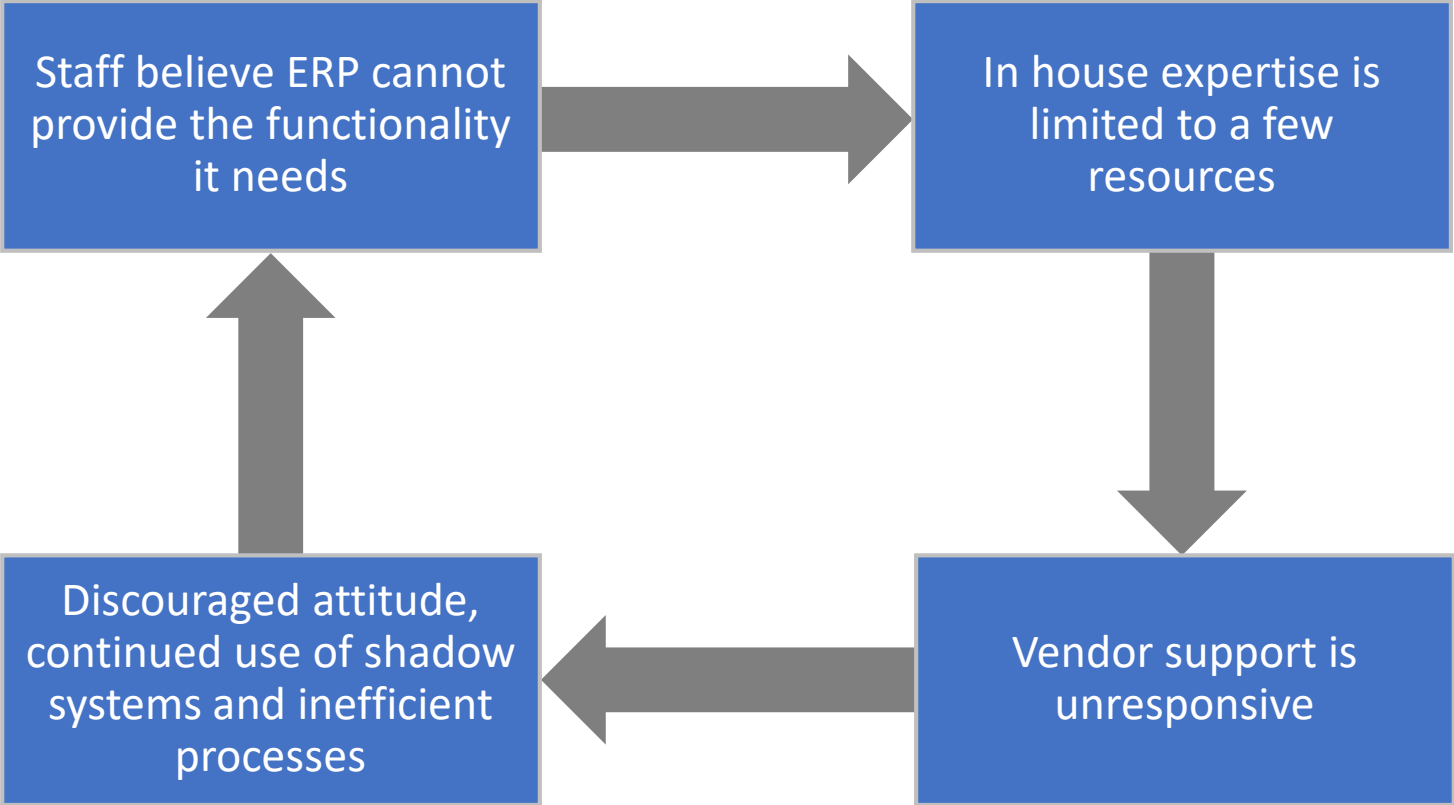
## Result

- 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?



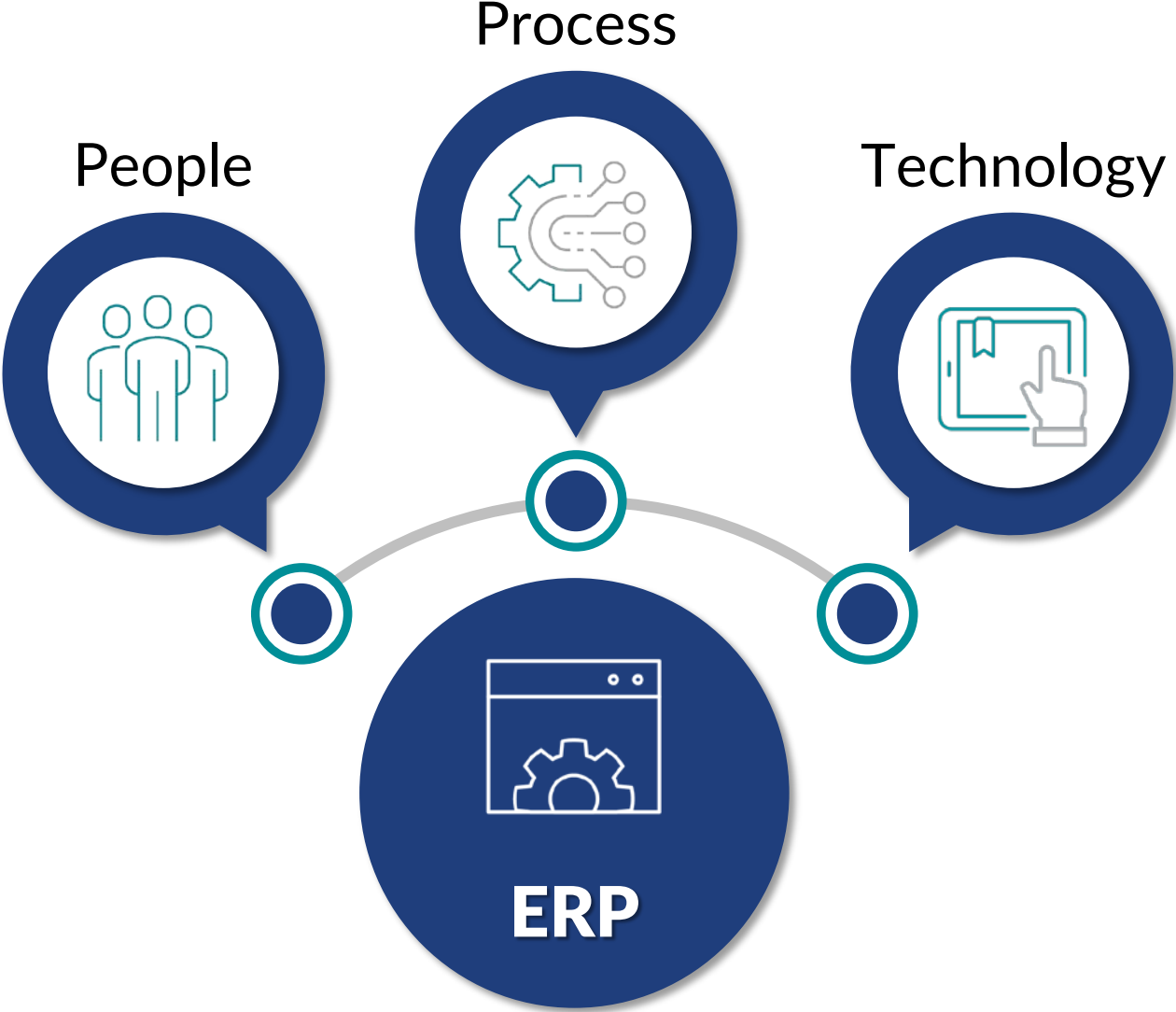


# Questions to ask in your assessment

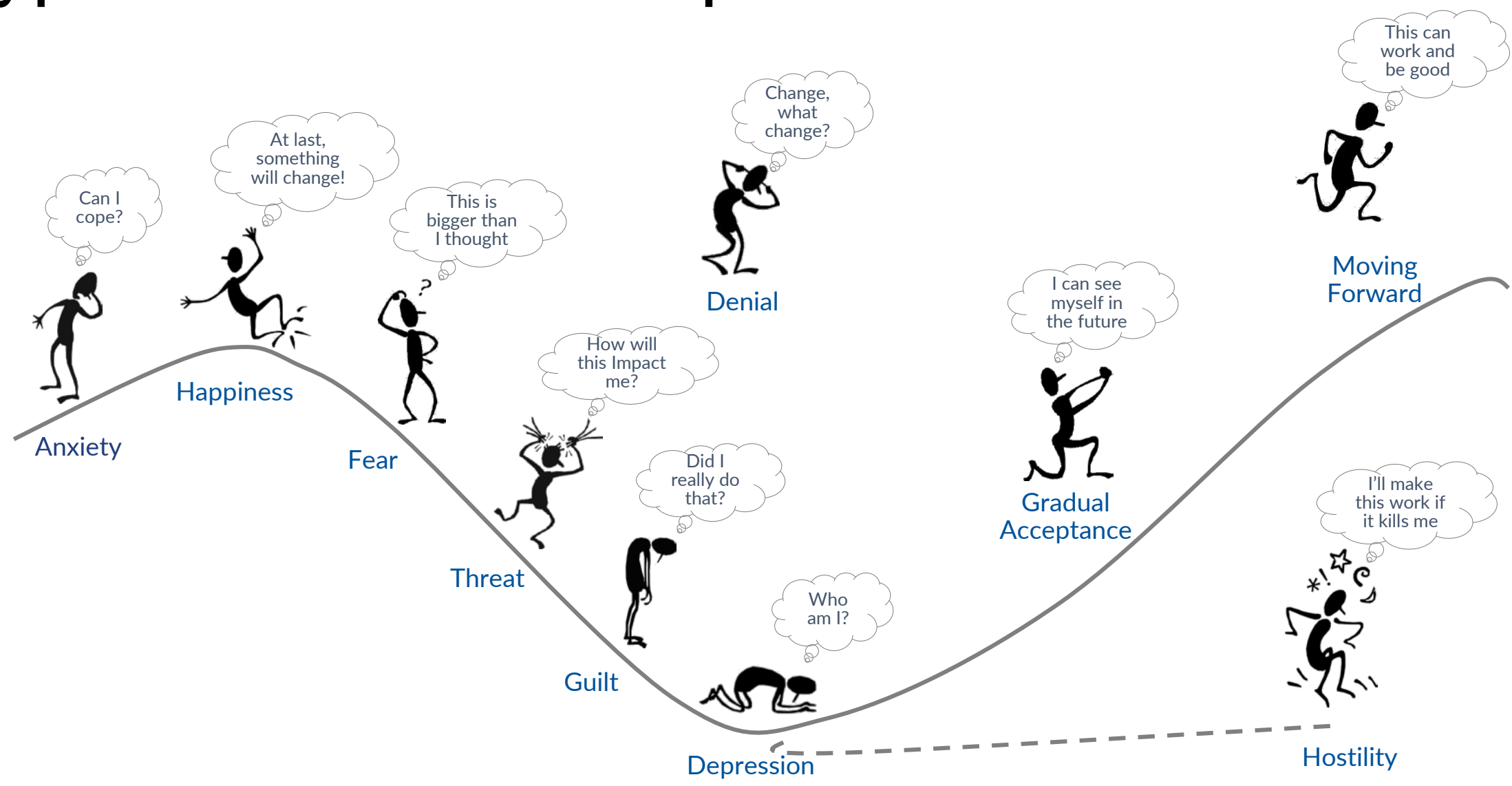


1. Is your vendor still very active in the marketplace?
2. If you are not on a current release, what are the costs to upgrade to the most recent release?
3. If you purchase a new ERP system, will you be in the same situation as you are now? What will change?

# “Also” a Technology Project



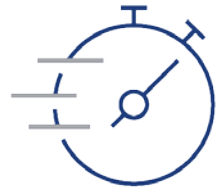
# Typical of an ERP Implementation



# Process Improvement Cues



Duplicated  
Efforts



Cycle Time



Searching  
and  
Indexing



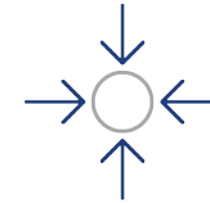
Internal  
Process  
Controls



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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Optimization

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