



# Preparing for the journey ahead

ERP implementation —  
a preparatory guide



**A tried and trusted guide dedicated to helping you make your ERP implementation journey as seamless and effective as possible.**

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# Fail to prepare, prepare to fail

**Implementing or changing an ERP system is a big undertaking. Deployment of a new system, of any scale, will inevitably bring changes to both data and processes across your entire organization.**

The risk of not realizing all of the benefits you envisioned is high. Analyst firm Gartner estimates that 55% to 75% of all ERP projects fail to meet their objectives. But this doesn't have to be the case for your ERP project. As the saying goes... 'fail to prepare, prepare to fail'.

Your ERP vendor will be your key partner as you progress through your implementation process but note the use of the word 'partner'. Your ERP vendor is there to provide the expertise you need to realize desired benefits, minimize downtime, accelerate staff acceptance and complete your project on time and within budget.

However, make no mistake. If you are to truly extract the full range of benefits expected from your new ERP software, it is essential that you prepare as much as you can for the implementation process you are about to embark on. This guide sets out the best practice preparatory work you can, and should, carry out in order to ensure your implementation is as smooth as possible.



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## The GenetiQ difference

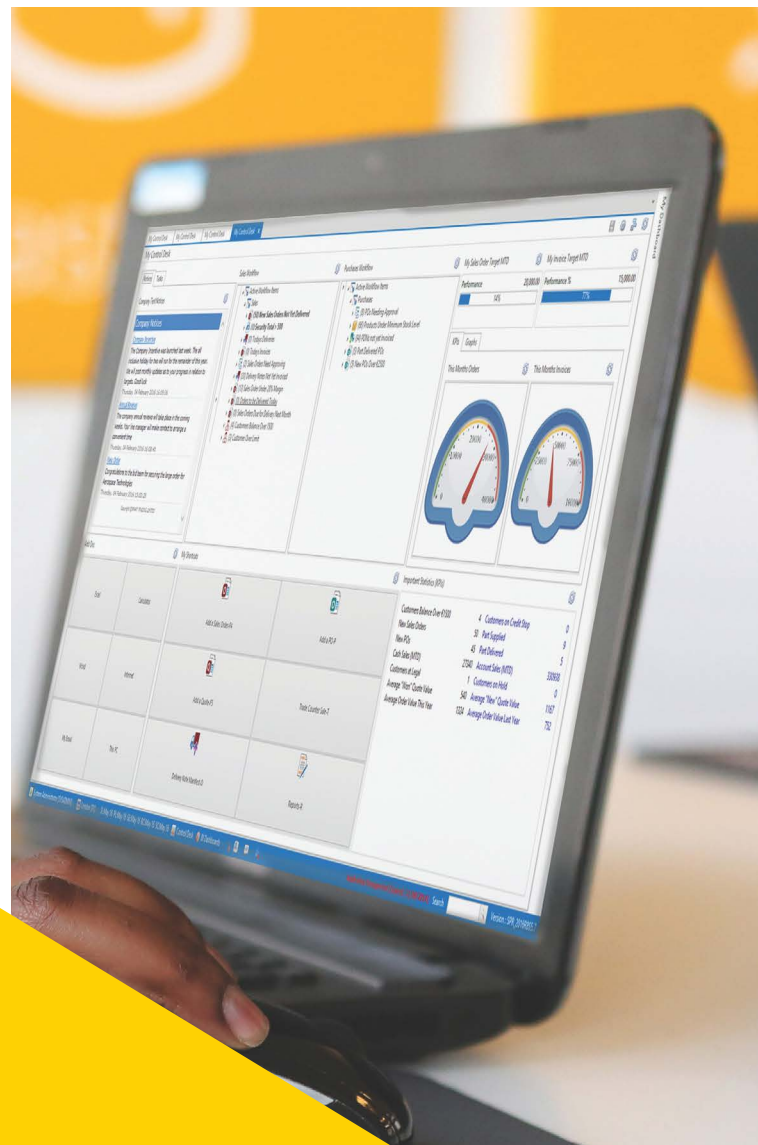
We have over 30 years' experience working in partnership with more than 1,700 companies, implementing ERP software designed for the lumber and building materials industry. Our success comes from taking the time to truly understand your challenges and using our expertise to solve them.

Our hands-on support, trusted processes and innovative technology will help you achieve more and work better every day. Our long-standing customer relationships, many spanning over 20 years, show our commitment to putting you first – from software development to ongoing support.

# Get in the driving seat

**Do not underestimate the value of having a strong pre-implementation plan in place. It ensures you and your organization are in the driver's seat, not the software vendor.**

The thought and effort you put into your pre-implementation plan now, before you even meet with an ERP vendor, will ensure your discussions are led by your business needs.



# We suggest you include the following elements in your pre-implementation plan.

Use this checklist to mark off each item before meeting with your ERP team.

1 **Project objectives**



2 **Scope of works**



3 **Project team**



4 **Change management team**



5 **Data cleansing**



# Project objectives

**While your vendor can and should help you to decipher what features and benefits your new system can provide, best practice suggests that you should begin by establishing clearly thought-out core objectives.**

This ensures the software features you require to run your business, and their related benefits, are not overshadowed by glamorous feature add-ons, that may add little or no value.

Think about what you're trying to achieve. What limitations are you encountering in your current system? Consider improvements you want to make across your entire organization.

Make your objectives definite, specific statements about what you intend to accomplish. Vague statements have no place on your goals list. Make them as quantifiable as possible.



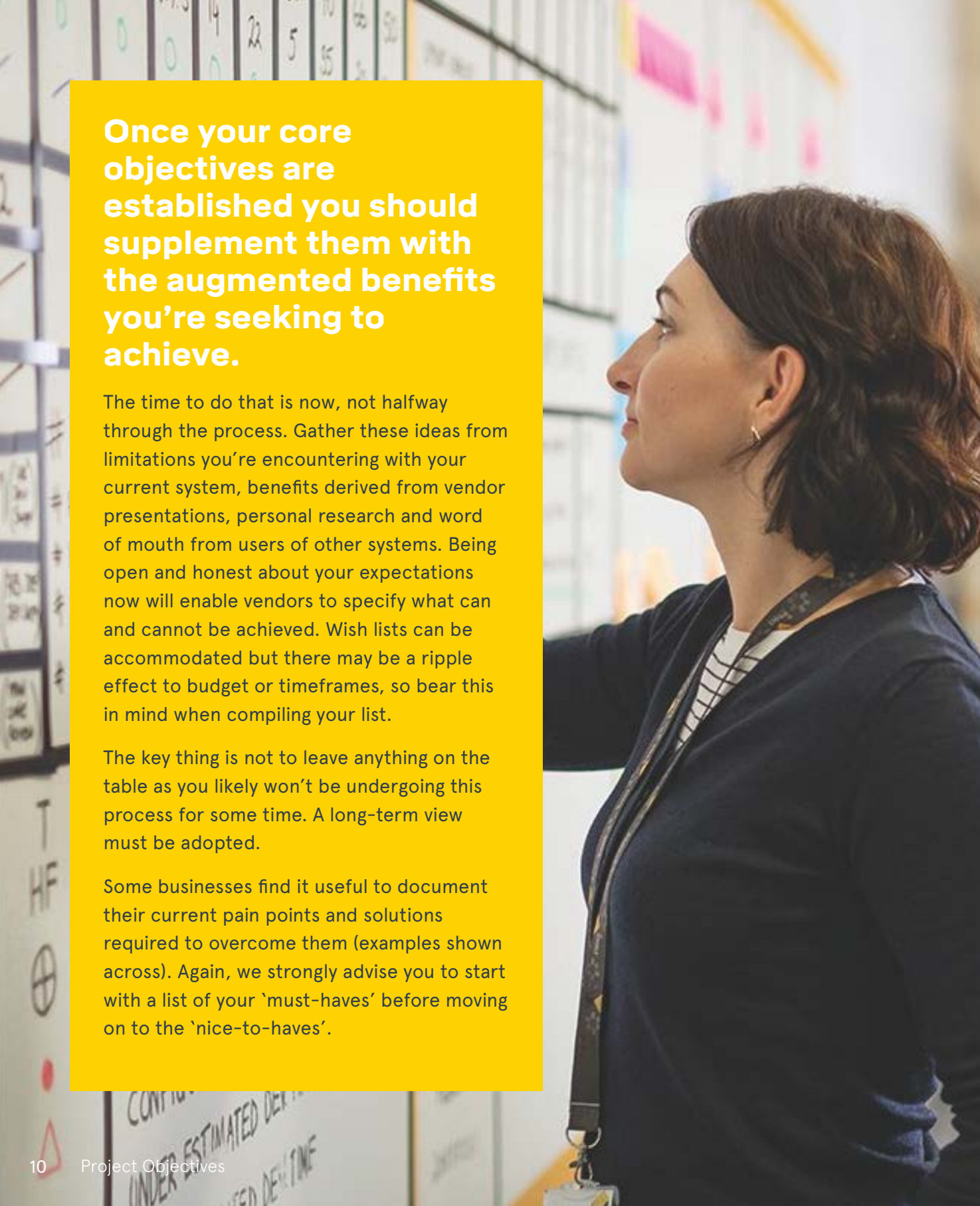


**“ ERP implementation failures often stem from poor relationships between vendor and client. Ensure you choose a trusted and partner-oriented ERP provider that you feel will invest as much into your project as you will. ”**



## **The GenetiQ difference**

Our core business logic and database structure can be modified to suit your exact needs both now and in the future. Additional modifications to accommodate changing requirements can be rolled out at any point during the product lifecycle. This allows you to customize the product to support future strategic change and growth long after your initial implementation.

A woman with dark, wavy hair is shown in profile, looking towards the left. She is wearing a dark blue zip-up jacket over a white and black striped shirt. A lanyard with a badge is visible around her neck. The background is a whiteboard filled with various notes, charts, and diagrams. Some of the visible text on the whiteboard includes "CONFIDENTIAL", "UNDER ESTIMATED DEL...", and "ED DEL...". There are also some symbols like a circle with a plus sign and a triangle with a red dot.

## Once your core objectives are established you should supplement them with the augmented benefits you're seeking to achieve.

The time to do that is now, not halfway through the process. Gather these ideas from limitations you're encountering with your current system, benefits derived from vendor presentations, personal research and word of mouth from users of other systems. Being open and honest about your expectations now will enable vendors to specify what can and cannot be achieved. Wish lists can be accommodated but there may be a ripple effect to budget or timeframes, so bear this in mind when compiling your list.

The key thing is not to leave anything on the table as you likely won't be undergoing this process for some time. A long-term view must be adopted.

Some businesses find it useful to document their current pain points and solutions required to overcome them (examples shown across). Again, we strongly advise you to start with a list of your 'must-haves' before moving on to the 'nice-to-haves'.

<b>Challenge</b>	<b>Solution required</b>	<b>Benefits</b>
Our current system can't scale with our growth plans as the technology at its core is outdated	ERP system based on .NET technology that enables 'out-of-the-box' configuration that can be quickly and cost-effectively customized	Our business is future-proofed as our new system will now support change & growth
KPI data is not available in real-time leading to slow decision-making and customer service issues	Real-Time KPI Dashboards and push-notifications	Improve performance by identifying & correcting issues before they happen
We have separate databases for different departments so we have to maintain multiple systems	Fully Integrated Single ERP Application	Promotes collaboration across departments, integrating and sharing both information and processes company-wide. This in turn leads to more effective, faster decision-making and better customer service
Our system is too rigid to adapt to changing business processes	Highly customizable system that allows advanced users to customize fields, views etc. as needed	Our new system will be flexible enough to adapt to changing business circumstances and our continued need to increase efficiencies
My system will not facilitate moving inventory between locations	Inter Branch Transfer Function	Accurate tracking of inventory between branches

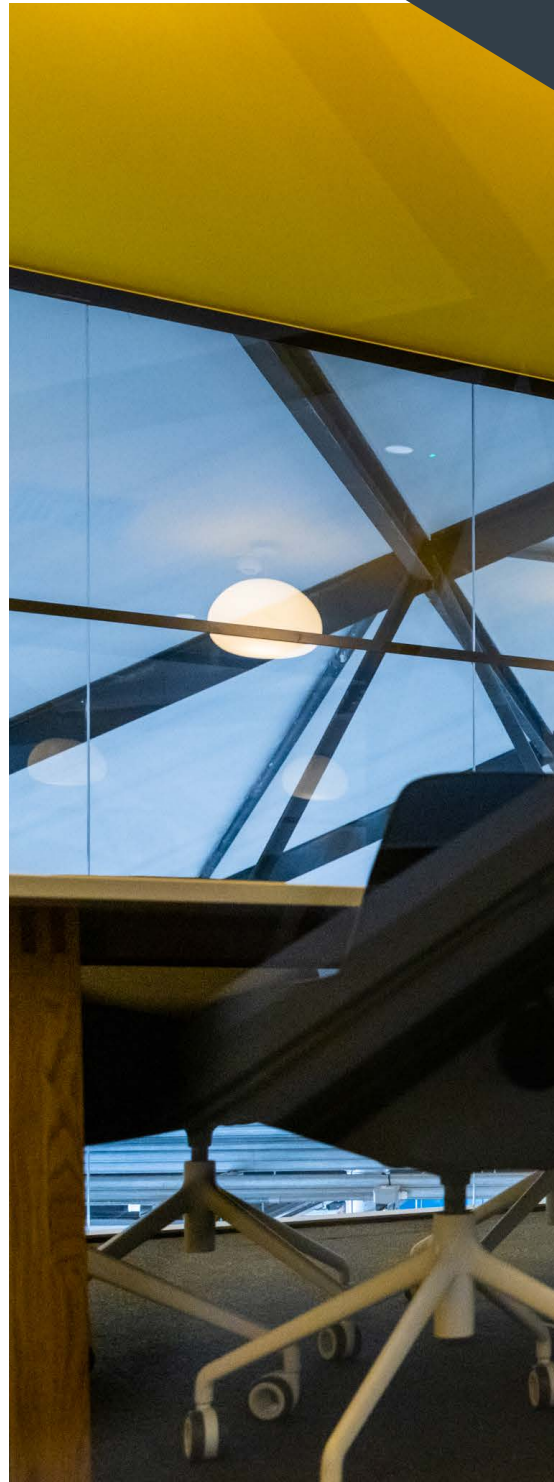
# Scope of work

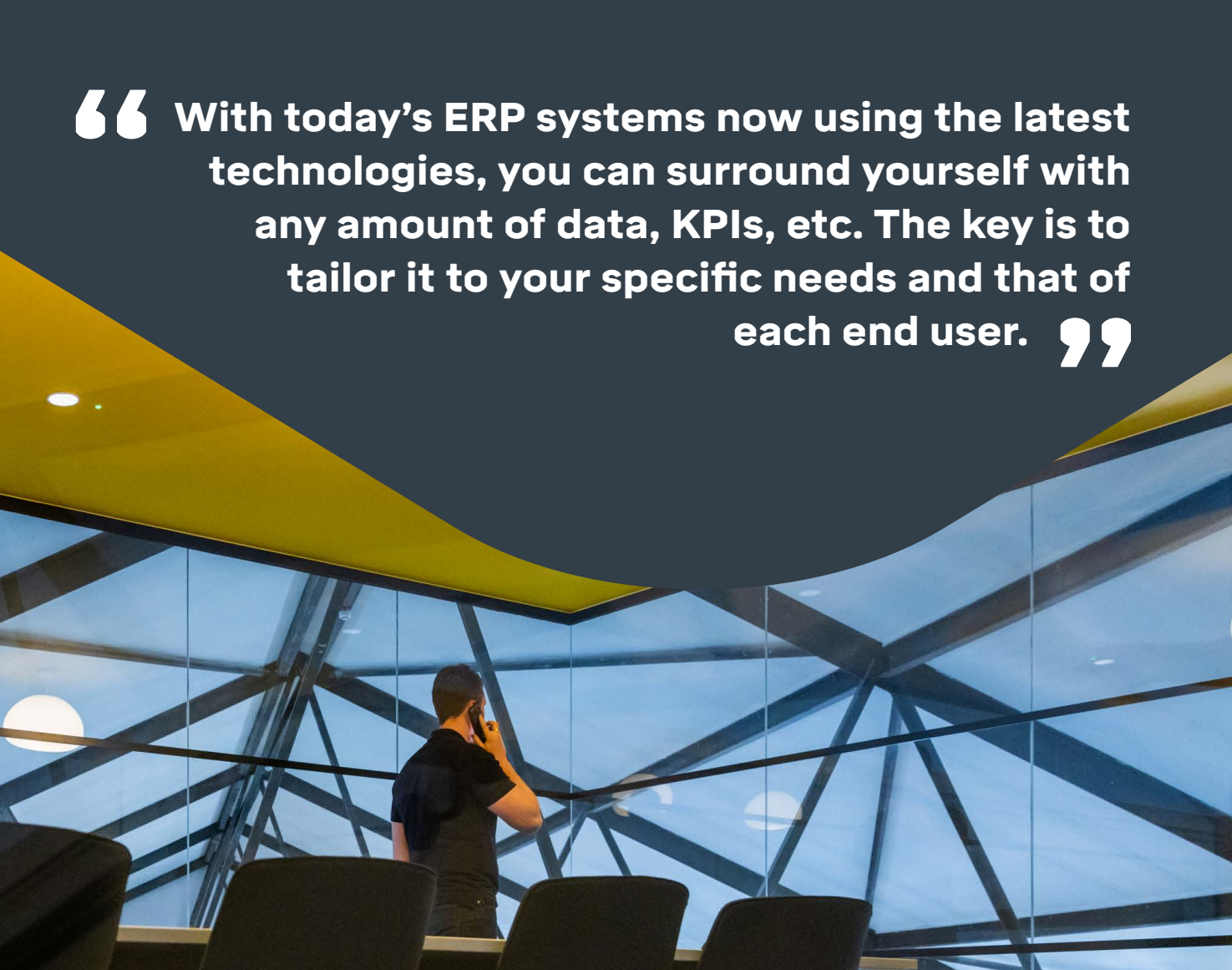
**It's crucial that your ERP vendor understands how your business currently operates and how you want it reflected in your new system.**

Each business has its own nuances, idiosyncrasies, whatever you want to call them, but in essence they make you... you.

There are many workflow tools available online that enable you to easily create workflow charts for your organization.

The use of visual flowcharts will help you to map out exactly how your business works in a way that's clear and easy to understand.





**“ With today’s ERP systems now using the latest technologies, you can surround yourself with any amount of data, KPIs, etc. The key is to tailor it to your specific needs and that of each end user. ”**

## **The GenetiQ difference**

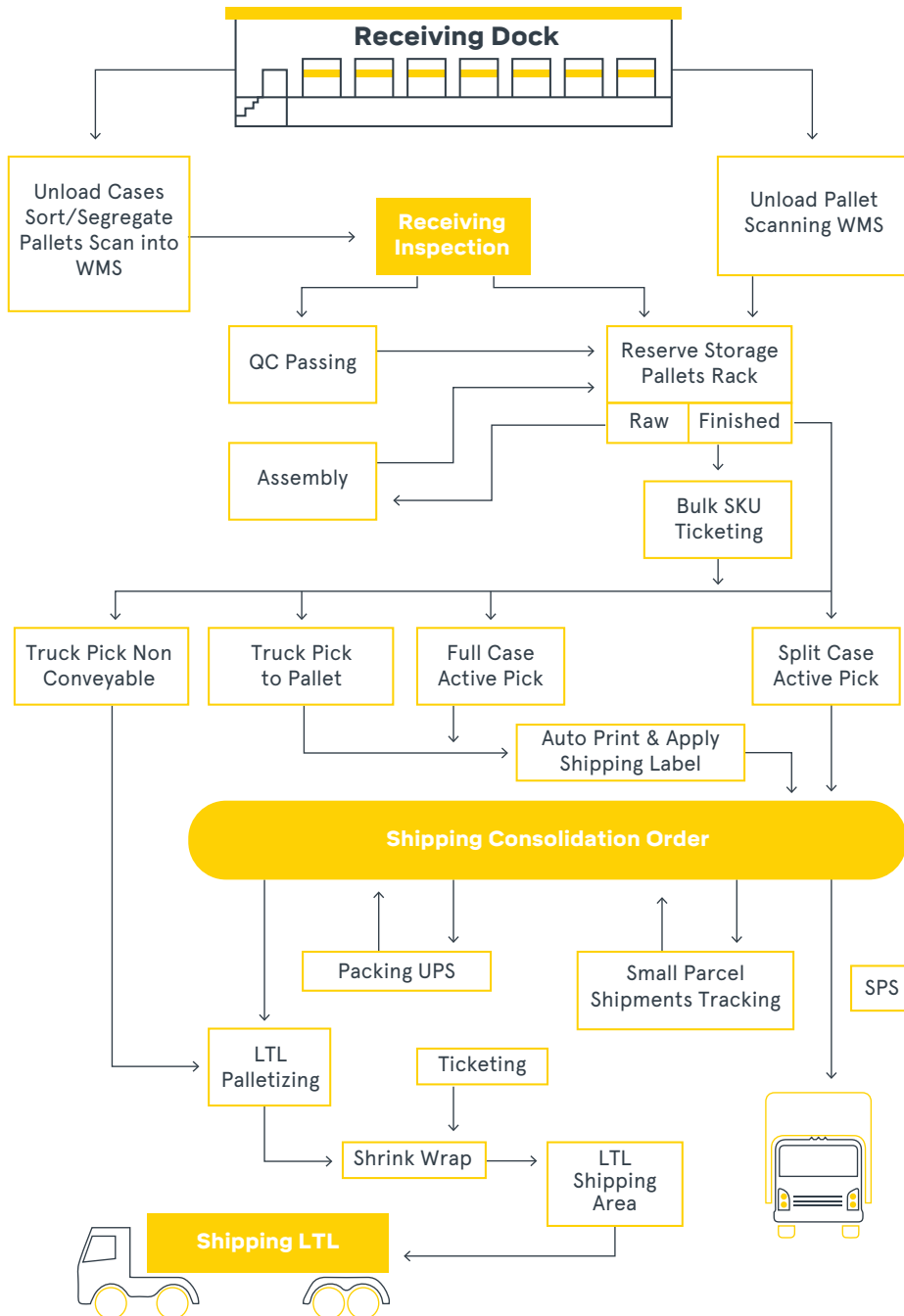
The first step on our implementation journey with clients involves undertaking an in-depth business process review. Our consultants work directly with your project team to record current business processes, future company ambitions and any other requirements you need us to take into account.

The aim here is to ensure day-to-day processes are not affected, while also ensuring we build in features that will drive benefits above and beyond that of your previous system. Furthermore, our mission is to future-proof your business to support growth and your long-term goals.



**The creation of workflow charts is often considered a tedious task but in our experience, has repeatedly proven to be worth its weight in gold as you progress through your project deployment.**

# An example might look something like...



# Project team

**Your ERP system forms the back-bone of your business, therefore a migration of systems must be managed by a competent project team that has full support from your senior management.**

Your team should consist of senior managers across the business to ensure all departments affected by the implementation are validly represented. This will aid acceptance of the system as each department adopts a certain level of project ownership relating to their particular area of expertise.

The other key members of the project team will include your software vendor who will assign a project manager and consultant(s) to your ERP implementation project.





“ We have found that companies who treat their ERP project as a strategic business improvement project, not as an IT project, secure the buy-in they require from senior management to make the implementation a true success. ”



## The GenetiQ difference

We understand that no two businesses are the same and no business ever stays the same. That's why our software comes bundled with a toolset that facilitates the nuances that often exist in a growing company. This unique set of tools gives you the autonomy to leverage your business data across your entire business. We've also

uniquely given our consultants the ability to customize your system to your own individual requirements, eliminating the need to involve our development team. The level of personalization that GenetiQ can facilitate, exclusive of any additional development, vastly exceeds that which the market is currently providing.

## The template below offers a general guide as to the required composition of an ERP Project Team

Role	Responsibility	Who
<b>Executive Sponsor &amp; Budget Holder</b>	This individual will have overall budget responsibility (sign off), the ability to remove any internal barriers should they occur or raise any <b>high-level</b> concerns regarding project progress from your side	Suitable candidate from within your organization
<b>System Owner &amp; Main Client Contact</b>	This is your internal system champion. They sign off on all system configuration and are involved in any major configuration decisions	Suitable candidate from within your business (though this person may not necessarily be the Sponsor)
<b>Team Leader – Sales</b>	This individual will provide supporting data from the legacy system and signs off the UAT (User Acceptance Testing) for this module	Suitable candidate from within your business
<b>Team Leader – Purchases</b>	This individual will provide supporting data from the legacy system and signs off the UAT for this module	Suitable candidate from within your business

<b>Role</b>	<b>Responsibility</b>	<b>Who</b>
<b>Team Leader – Inventory</b>	This individual will provide supporting data from the legacy system and signs off the UAT for this module	Suitable candidate from within your business
<b>Team Leader – Finance</b>	This individual will provide supporting data from the legacy system and signs off the UAT for this module	Suitable candidate from within your business
<b>Project Manager</b>	Responsible for managing scope, deliverables and timeline	Software Partner
<b>Consultant(s)</b>	Responsible for the configuration of the software in line with your expectations	Software Partner
<b>Hardware/ Database Support</b>	Responsible for ensuring the hardware or cloud environment is configured to enable the smooth operation of the new software system	3rd party vendor or most software partners will provide this support

# Preparing for change

**The importance of your ERP project and its impact on your wider organization should not be underestimated.**

Failing to appreciate the cultural barriers and change implications that could arise is a major oversight. Take the time to review your current situation and how this change will impact your business and staff. How will the process be managed? Are there any cultural implications?

Creating a change management strategy alongside your implementation plan helps limit the resistance to a new system and can identify any problems before they become disruptive to day-to-day business.

## The GenetiQ difference

With us, you'll get all the tools and expert knowledge you need to run, improve and grow your system as your business expands and changes. Our support team is locally based and work closely with our developers and consultants. Together we ensure we understand all your specific requirements and solve any queries quickly and effectively.

Through our efficient helpdesk system, you can track all your service requests anytime, day or night.

# Some of the key areas to include in your change management



## Staff communication

**Schedule regular meetings/ briefings with all affected staff throughout the project.**

Where possible initiate these meetings at the pre-planning phase so that feedback from staff can be incorporated as early as possible. This will facilitate a level of mental buy-in while also providing ample notice that this change is happening. Be as inclusive as possible throughout the project to help staff feel that this change is not being imposed on them.

Acknowledge their concerns but focus on the benefits that will be derived post implementation and the support that you will provide to make the process as painless as possible.

## Training

**Training requirements may differ per staff member.**

Once the allotted training days are exhausted, a sense of panic may creep in among certain employees who feel they have not fully grasped how the system works. There are two ways to address this.

One option is to identify early in the budget building process any additional training days you may require or include an optimization phase post-implementation.

It's easier to include them now rather than fighting a budget battle to get this cost added retrospectively. Another option is to adopt a 'Train the Trainer' format; where key individuals receive in-depth training and their role within the company is to impart their knowledge to existing and new staff.

## Ongoing support

**In addition to broader training needs, all software vendors provide ongoing support services.**

Find out what support services will be available to you post go-live. These will reassure staff once you're live on your new system.

# Data cleansing

**As the saying goes... 'Garbage in, Garbage Out'. The importance of undergoing the data cleansing process at the pre-implementation phase should not be underestimated.**

Ensuring your project starts out with clean, accurate and relevant data will save you time and money in the long run.

Take the time now to decide how much historical data you wish to migrate to the new system and indeed how much data must be migrated for compliance reasons. Ensure all duplicates, irrelevant and incorrect data is removed from the system pre-migration.

This is not a glamorous job but the effort expended here will reap huge rewards down the line. Assign the appropriate employees to the task and provide them with the time allowed to complete this task fully. The employee selected for this task must have an eye for detail and a solid working knowledge of the data that will enable them to extract your most relevant data.

## The GenetiQ difference

A lean and relevant database is key to your operations. During every implementation we work with our customers to perform a data clearout removing the unwanted and historical data.

A data migration process is run and checked by your consultant prior to running in the live environment.

# The GenetiQ implementation approach

Every vendor will have a different approach to implementing their ERP solution. We can only vouch for ours within this guide and showcase this as a topline example process.



## 1. Business process review

We evaluate and document all staff roles and outline all key business processes such as SOS, POP, Inventory, Accounts etc. We then specify how these processes will be replicated and/or improved within GenetiQ.



## 2. Data conversion

We import the applicable relevant data from your legacy system, utilizing ready-made templates for Excel or CSV formats.



## 3. System design

Your settings, form designs, reports, workflow process flows, account settings, etc. are aligned by your consultant in line with the findings from the business process review. It is during this phase that individual user interfaces can be personalized.



## 4. Pilot phase

In test mode, using sample transactions, your consultant will lead each module owner through each business process in GenetiQ to ensure adequate functionality for go-live.



## 5. User training

We ensure both generic induction and back-office training is carried out along with customized training for individual users.





## 6. Go live

Upon completion of a detailed plan 2-4 weeks prior to launch, your test company is commissioned on the live system.



## 7. Go live support

The project manager will work with you and your GenetiQ consultant to ensure a seamless go-live and iron out any initial startup issues.



## 8. Post go live hypercare

As you transition to the CSO team, you and your employees will be empowered to fully maximize the functionality of the GenetiQ system over the course of the next 6-8 weeks to include two month-ends.



## 9. CSO hand-over

Through the Customer Success Office, you will have access to a range of resources and expertise to ensure you can seamlessly and robustly manage, evolve & scale your GenetiQ system in line with business needs and ambitions.

## The GenetiQ difference

Our 30+ years' experience implementing our ERP and business management solutions has shaped our tried and trusted implementation approach. Each phase is regularly reviewed and adapted to ensure we are meeting the needs of our customers. Deep collaboration on behalf of both us, and the customer, is required every step in the process. This will ensure our system is tailored to serve your unique needs.

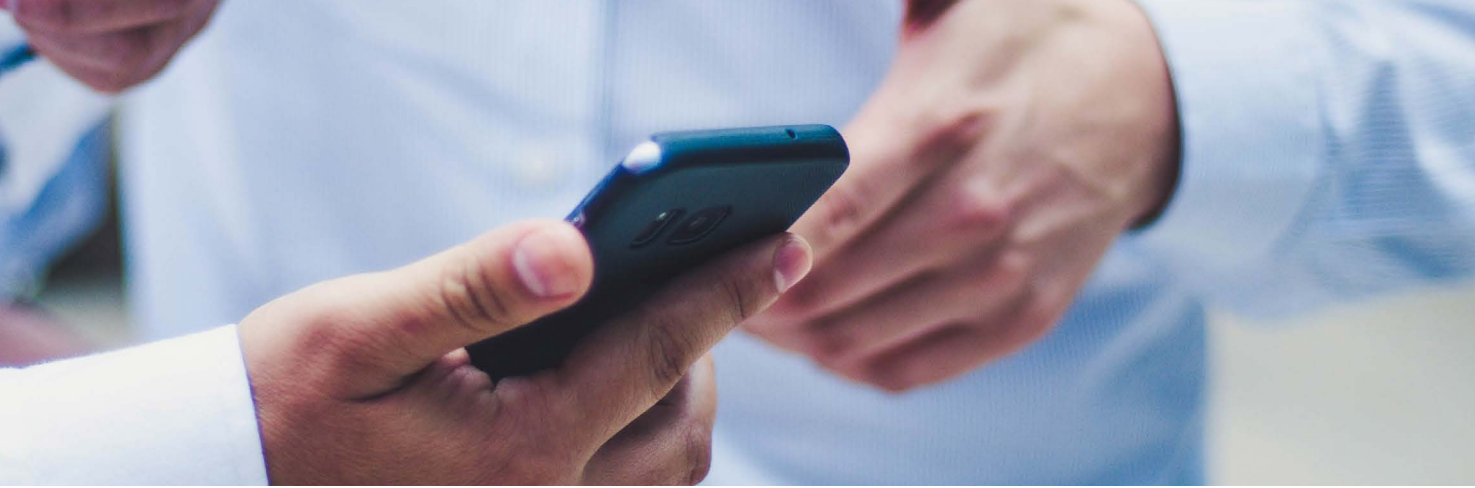
# Frequently asked questions

## **How long does it take to implement a new ERP system?**

Typically for an average size project, companies tend to allow for 6 months from date of order to go-live. Given that the process of evaluating and choosing a system can take several months, a company should take all this into consideration when putting timelines around a project like this.

## **Do I need to change my IT infrastructure?**

- When considering a new ERP system, it is important to get professional assistance in evaluating the network, PC requirements and deployment methods (cloud, hosted or hybrid) for your software.
- The investment required will depend on the age and condition of the existing infrastructure and the specifications required for the new software.
- Different software systems have different needs when it comes to resource and license requirements; all of which will have a cost impact on your overall project.



## **When is the best time to implement a new ERP system?**

There is no ideal time for undertaking a project like this but we would suggest taking the following into consideration when choosing the 'when' for your project:

- Some companies favor a 'financial year end' as this makes a clear break, which is fully auditable with opening balances provided by the accountant.
- A 'month-end' should be chosen so that the audit trail is maintained by the common month-end reports on Accounts Receivable, Accounts Payable, Trial Balance etc.
- The availability of resources to do data cleansing, training, user acceptance testing etc can play a major part in choosing when to go-live on a new system. Vacation periods, Thanksgiving, etc must all be taken into consideration to ensure that the key people involved are free to take part in the project.
- Companies should also take seasonal considerations into account when deciding on a go-live date. Most businesses have busy periods where they do not need the distraction of a system change on the agenda when they should be putting resources into sales.

## **Do I need to use different pre-printed office supplies?**

- In most cases, a new system should be able to design the necessary outputs to accommodate the existing office supplies. However, we would advise that you need to analyze the cost of the time it takes to redesign the output forms to see if it is worthwhile. The rollout of a new system is an opportune time to make sure that your corporate image is supported on your invoices, purchase orders, statements etc.
- Switching to laser output forms may be a move worth considering, leading to reduced costs on pre-printed office supplies. The capabilities of modern systems also extend to greater use of electronic communication and document management, and this should be embraced as part of the solution.

## The GenetiQ difference

Your ERP system should provide you with the tools to unlock your true business potential. GenetiQ, our latest ERP software empowers you with the systems and information you need to unleash that potential.

Built and supported in Ireland, the UK, and the U.S, we are all about helping great businesses like yours take control, drive sales and improve margins.

Our mission is to organize your business information into an easy-to-use, single system where it can be leveraged to enable your business to operate at its best. Through our unique personalization layer, you have the independence to create automated business processes and role-based screen designs that drive operational effectiveness and support your growth.

Designed specifically for lumber and building material suppliers, our software adapts to your way of working. Customize your system exactly how you need it - it's all about what you want to do and how you want to do it.

**To find out more about how we can elevate your business, head to [www.genetiqerp.com](http://www.genetiqerp.com).**

Get started at [genetiqerp.com](https://genetiqerp.com)



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This ERP Implementation Guide is for guidance only.

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