Project Management

Intact – Project Management

Implementing a new ERP solution can unlock incredible value and untold benefits for your business but successful ERP implementations don't just happen. They take a team of dedicated individuals and a lot of hard work from both the ERP vendor and customer. And whilst there is a lot to take on, our project management team is here to guide you, every step of the way.

Project managing an ERP implementation project is a very demanding responsibility as businesses seek to best manage the budget and time that they have dedicated to this task. It's really important to remember that ERP implementations only happen once every 10-15 years in your business so it's vital that both the ERP vendor and the customer dedicate the appropriate resources and experienced personnel to the project. This will ensure your ERP solution yields ROI for years to come.

Your Intact Project Manager fills an essential role of leading both project teams; ERP vendor and customer, setting the cadence for the overall project and helping to escalate and manage issues as they arise.

It is only through the expertise of your seasoned Intact project manager and the collective effort of both companies that we can ensure an on-time, on-budget and successful ERP implementation.

Your Intact Project Manager

At Intact, your designated project manager is your trusted advisor. They have your projects best interests at heart. They are there for you right from pre-sales to project close when your account is handed over to the customer success team.

Your Intact project manager will keep everyone on course. Working to your project objectives they ensure everyone stays on track including our Intact consultant, development and ICT team and your team. They keep everyone focused on the end goal and use the project plan as a means to drive collaboration and alignment. They manage the relationship, resource scheduling, commercials, and timelines throughout.

Your Intact Project Manager is the vital link that helps control, track and coordinate all activities to reach your ERP project objectives.

The Role of Your Intact Project Manager

Create and manage an appropriate project governance structure

Drive timely decision making

Produce consistent and concise project status reports & conduct related meetings

Manage all development related projects

Manage project milestones

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Manage project scope ensuring scope creep is limited and always transparent

Manage communications between stakeholders

Progress timely data migration activities

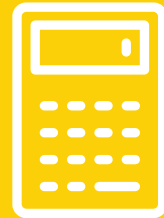**fective risk anagement**

Schedule training with your employees

Effectively manage all change requests (if applicable)

Intact Project Management Areas of Responsibility

Financial & Resource Management

- Support project resources management.
- Track and report on project finances.

Requirements Management

- Provide requirements management support to the programme.
- Document, trace, and prioritise requirements.
- Controlling requirement change and communicating to relevant stakeholders.

Teamwork Management

- Responsible for managing the planning, tasks, risks, documents, links in Teamwork and ensuring its up to date.

Planning and Reporting

- Integrated project planning and tracking progress against plan.
- Progress meeting preparation and status report production.

Risk and Issue Management

- Risk and issue tracking and management.
- Support the project team to get risks and issues resolved to continue project progress.

Change Control

- Design and implement the change control process for the customer.
- Track and manage change requests.
- Facilitate and support meetings related to Project Change Requests (PCRs).

Actions and Decisions Management

- Follow up and manage actions and decisions which may arise from the various project meetings or communications.

Your ERP Implementation Journey

On a standard Intact ERP implementation project there can be up to 185 projects tasks to be completed. All of these tasks are captured, scheduled and monitored in Teamwork; an online platform used by our project team to facilitate effective collaboration, meet deadlines and ultimately deliver the project in line with shared expectations, agreed from the outset.

We consider your ERP implementation project in terms of its scope, complexity, and size to ensure the appropriate tasks are assigned to your project. It's important that we adopt this tailored versus standard approach so vital tasks are included. However, it's important that we recognise that some tasks may not be appropriate to your requirements and need to be removed. This approach ensures the project remains streamlined to deliver maximum return on investment whilst remaining 100% effective in terms of goal delivery.

ON BOARDING

- Establish Project Team
- Define Governance
- Complete Project Plan
- Complete Static Data Migration
- Set Up Environment (On Prem/iQ Cloud)

01

Our ERP Implementation Process

To provide a structure and a sequence of events for your ERP project, we divide your implementation into 5 distinct phases. And to ensure your system is tailored to your specific needs, each step in the process requires deep collaboration on both sides.

Your project manager will guide you through this process. They will ensure your ERP solution can get you operating successfully at Go Live and long into the future.

With a clear vision of the implementation process and the ability to follow-through, your project manager will drive decision making along the way. Their understanding of your goals and project timelines will ensure your ERP implementation has the best chance of meeting your expectations and more.

The Intact iQ Implementation Process

02

USER ACCEPTANCE TESTING (UAT)

- Project Team Training
- Project Workshops
- Deploy PCR / Integrations
- Data Conversion Testing
- UAT – RAG metrics
- Go Live Readiness Review Presentation

CLOSE

- Post Go Live Modules
- Project Close
- CSO Introduction & Handover

04

DISCOVERY & DESIGN

- Import First Cut Data Migration
- Business Process Review Meetings
- PCR Register
- Test Dataset on Server
- Induction Training

03

GO-LIVE & SUPPORT

- Live Data Conversion
- Freshdesk Account
- Go Live (& 1st Month End)
- Post Go-Live Support

05

Your Commitment

It is our job to implement an ERP solution that delivers the best version of your business, but we can't do this without your deep involvement. Whilst we are software and industry experts, we will need time to get to know your business. For this, we will rely heavily on your team to empower us with the necessary knowledge, guidance and assistance to enable us to optimise your business processes in your ERP solution. From day 1 we will adopt an ethos of transparency, frankness and best practice guidance with your team so that we, collectively, have the best chance of delivering on this mission.
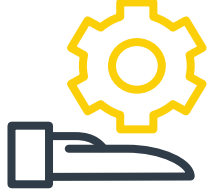
From the outset, your project manager will clearly advise you on:

01.   **Who should be included from your team**

02.   **How much time they will need to dedicate to the project**

03.   **What tasks they will need to complete and when**

04.   **What engagement our consultants will need from your senior and wider team, particularly during the business process review stage**

Whilst your Intact project manager will take the lead, remember we're in this together. Two-way communication is always essential, as is keeping on top of assigned tasks to keep your project on schedule.

Your Project Communications Plan

Constant and accurate communication is key to your project's success. Your project manager will create and manage the communications plan for your project which will include the following communication formats:

Status Meeting

WEEKLY STATUS CALL

- Project team will catch up on the overall status of the project
- Resources will be agreed, days signed off in advance
- This meeting will run for the duration of the project

Steering Meeting

IF/WHEN NEEDED

- Review project status with senior stakeholders
- Project sponsors required for all steering meetings

Teamwork Portal

- Introduced at the Project Planning Meeting, this is the preferred method of communication for the project team pre go live

Project Status Report

- The PSR will be issued on a regular basis
- Report summarizing the current status of the project

Your Project Plan

Your overall project plan is detailed and managed in our collaborative online platform, Teamwork. Here our customers and the Intact project team can view and manage the project plan, key milestones, tasks, task assignment etc. It keeps everyone on track and forms the basis for our weekly project meeting with our customers.

Gantt charts are also auto generated in the platform which enables the project team to visualise the project's critical path and manage any foreseen impediments to ensure timelines are consistently and tightly controlled throughout. This is crucial when Go Live dates are set around key business milestones or events. If for some reason delays creep in, early warning is vital so that your business can be prepared and your agreed Go-Live date is not missed. This approach is prudent and is designed to enable successful Go Lives as per your project plan.

Get in Contact

To find out more about
Project Management at
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