



TYPICAL ERP PROJECT IMPLEMENTATION PLAN

Our firm provides consultancy services in the specialised discipline of supply chain & logistics. We don't project manage full ERP system roll-outs, but we often provide subject matter expert (SME) input to ERP implementation projects. After all, which ERP project won't have a supply chain component?

So, what are the stages of a typical ERP Implementation Project Plan? There are actually 6 stages

1. Discovery and Planning

During this period, the project team will be created. There will be initial meetings and documentation developed as the team works to identify current issues and potential solutions. An important part of this phase is constructing the project plan, which will serve as a guide throughout the rest of the project.

2. Design and Configuration

What will the new enterprise-wide system look like and how will it be used in the organization? In the ERP Design phase, the project team and implementation team will be working out the various configurations for the new system, defining roles, and documenting standard procedures.

3. System Development

The purpose of the development phase is to prepare the entire system for going live. This includes activities such as completing any necessary customizations, developing user trainings, and importing data. With ERP implementations, like any custom software development projects – "First, Solve the problem. Then, write the code".

4. Testing

Is the system's functionality aligning with the set requirements for the project? The Testing and Development phases will often overlap, as the implementation and project teams jump between the two – constantly fine tuning the configuration. By the end of this phase, project team members will be comfortable doing their jobs in the new system. This is the final step before diving into the live system.

5. Deployment / Go-Live

The project team and implementation team will assess the situation and make the final go or no-go decision. Prior to going live, the final data will be loaded and validated. The project team will train other employees who will then start working in the new system, and completely stop using the old one.

6. Post Go-Live

Once the ERP system has gone live, the purpose of the project team will shift. Over time, as the way the users work within the system evolves, adjustments and changes to the system configuration may be needed.

The above summary of the 6 stages of a typical ERP Project Plan of course only shows the tip of the iceberg. The key activities within each stage are summarised below

1. Discovery & Planning
 - a) Establish the Project Team
 - b) Hold Discovery Meetings
 - c) Document Key Processes and Requirements
 - d) Identify Potential Gaps, Risks and Solutions
 - e) Build the Project Plan
2. ERP Design & Configuration
 - a) Gather and Review Master Records
 - b) ERP System Orientation & Walkthrough
 - c) Establish Initial System Configuration Settings
 - d) Create a Prototype
 - e) Define User Roles
 - f) Document ERP Procedures
3. ERP System Development
 - a) Customization
 - b) Configure the Go-live System
 - c) Simulate a Live Environment
 - d) Develop End User Training
 - a) User Acceptance Testing
 - b) Import Sample Data
 - c) Adjust Configurations
 - d) Establish "Cut-off" Strategy
 - e) Simulate Running the Business
 - f) Deliver End User Training
5. Deployment / Go-Live
 - a) "Go / No Go" Decision
 - b) Load Static and Dynamic Data
 - c) Validate & Balance Against Legacy System
 - d) Start Using It
6. Post Go-Live
 - a) Converting the Project Team
 - b) Identify Problem Areas & Develop Solutions

Now, some questions for you

- i. Does the typical ERP Implementation Project Plan described above resemble your company's approach to your ERP project?
- ii. What SME input did you have into the supply chain elements of your ERP project?

Author's Comments:

- The notes above provide a summarised outline only of a typical ERP Implementation Project Plan. A full copy of a Discussion Paper on this topic can be obtained by requesting directly from Supply Chain Services Australia on phone 08 9453 5999
- References include: *The 6 Phases of any Business Software Implementation*, Art Olsen, 2016 and various internal Supply Chain Services Australia documents

