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Wise words for project success

How many of you are contemplating a core business system (ERP) project in the New Year? Implementing a brand new, integrated information system can be a daunting prospect. And if you haven't already done so, how do you go about deciding which is the right system for you? Sales, purchasing, inventory, QA, production, forecasting, trading, financials... this kind of project will most likely touch every person and process in your business. If information is the lifeblood of your organisation in today's competitive world, think about it this way: putting in a new system will be like replacing its heart and many hundreds of arteries and veins at a stroke... without anaesthetic. It could hurt a lot! And your business must trade normally with the outside world while all of this change is going on internally. So what can you do to avoid the pain, and make your new system implementation a success next year?

ERP systems are not new, and a browse along the project management shelf in a good bookshop will provide more reading material for the Christmas break than you can sensibly handle. As in every other walk of life, however, you can benefit a huge amount in a short time from seeking out some experienced individuals who have been there before you, and listening to their advice. Here, then, are some wise words from six key players in the industry who know exactly what it takes to succeed:

Understand what you are doing and why

"I think that many ERP projects run into trouble right at the very start because they are poorly conceived. Often the business case has not been adequately developed", says Simon Eagle, an independent management consultant who specialises in the fresh produce sector. "The business case must focus on needs and the benefits that are expected from the project. These benefits should be a touchstone throughout the entire project lifecycle since they define why the project exists. Regular reference to the original business benefits ensures that the project direction is continuously scrutinised."

Chris Yates, Professional Services Manager for Anglia Business Solutions, also places a lot of emphasis on defining the terms of reference for the project. "Get it down in writing", he says, "Scope, objectives, benefits, resources, risks, the lot. The process of writing it down will help you pinpoint the questions you don't have answers to. Find those answers! When your document has been agreed, you can

share it with everyone who joins the project, to explain what's being done and why."

Get commitment from the top

Gayle Gilman, IS Manager for Sinclair International, has recently helped her company to complete a global ERP roll out. She works from Sinclair's head office in California, and has no doubt about the importance of commitment from the top: "The business has to know that the change is 110% embraced by management. Top management has to explain, frequently and with enthusiasm, what the business has to accomplish and why it is important, thus creating a positive environment for change. Past experience has shown that in implementations championed by IT alone the level of acceptance within the business is not as high, and it takes longer to get things done".

Patrick McCafferty, ICT Director for Wight Salads Group, agrees with Gayle. "You must have an executive sponsor for a successful project", he says. "And even if your CEO is 100% behind the project, make sure you identify and involve all the stakeholders as well. Buy in at operational level and department champions are essential. IT departments do not implement ERP systems well on their own – create a project team of staff from every affected department, and involve them totally."

Pick the right partner...

Patrick again: "It is not enough to have a software supplier who knows the product and has knowledge of your industry", he claims. "Your project team must be able to establish a strong working relationship with the supplier's personnel. They are an integral part of your implementation and a key to your success."

Nick Turnbull, Technical Director for Branston Ltd., also believes choosing the right partner is important. "There will be problems and unforeseen issues along the way", he says. "On occasion these will test the partnership between customer and supplier. If trust and honesty exists between the two parties, then problems can be overcome in a constructive and timely fashion. Effective and open communication is needed."

... and the right system

"In recent years, a number of new solutions have emerged which are focused on the fresh produce sector. This is good news", says Simon, "but selecting the right packaged solution is not that easy. Most companies produce a Request for Information (RFI) document and shortlist potential suppliers from the responses they receive. Presentations are then arranged with the short-listed suppliers and

this leads to the selection of a preferred supplier". Simon has some ideas for streamlining the process. "In my experience a straightforward, weighted points scoring system linked to the business benefits works well", he says. "It provides both consistency and objectivity in the evaluation process, and gives a simple way of ranking competing suppliers. In a team environment, the use of a common evaluation method provides a valuable reference when comparing a number of different supplier solutions at the detailed level. Of course, you also need to choose a solution provider who can act as a true business partner – a company that understands the sector you operate in, and invests in their solution to address emerging requirements. A comprehensive due diligence process is vital to achieve the necessary level of confidence."

Resource up

What about the amount of effort involved? "Evaluate the available resource and be realistic", advises Nick. "Before embarking, take time to understand the quantity and quality of resource at your disposal. A big project will be a drain on any business and in particular on key staff whom will almost certainly be busy people already. There must be sufficient resource available to competently manage the project, both from a technical and a training/education perspective. It's fine to be ambitious, but crucial to be realistic."

Michael Clarendon, LINKFresh implementation consultant for Anglia Business Solutions, also believes resourcing to be all important - both for the customer and the supplier. "Dedicated project resources work best", he says, "but it's not always possible. Getting quality time from the key users is essential, and management must do everything to make sure that happens."

Gayle emphasises one role in particular: "A good project manager is an important component in the mix", she says. "Someone with the experience to juggle all the priorities, whom can act as spokesperson, provide motivation and deal with the occasional crisis is the cornerstone of a large project."

Execute well

Now you've decided what to do, which partner to work with and what resources you need... how should you go about making it happen? "Take time to understand the business processes and future requirements", says Nick, "and make sure your consultants do too. With a sound understanding of the requirements upfront, the likelihood of delivery to everyone's satisfaction is increased."

"It is important to have a methodology to control the project", Patrick believes. "But it doesn't matter which one you use, so long as it fits your company and project requirements."

Michael thinks that testing should be stressed. "Allow plenty of time for the conference room pilot (CRP)", he says. "This is the best chance your users will have to test the system before you go live. As well as picking up any last minute issues with system configuration, they will also get a chance to practice what they have been trained on. Everyone should make the most of this opportunity".

"Continuous communication is needed with the business", advises Gayle. "The most successful projects have been those that go the extra step. Put project milestones up on the company notice boards; give the team members a t-shirt with a project logo... make sure project updates are communicated in departmental meetings. The key is to get everyone involved, and keep them learning, and talking positively, about the new system."

Conclusion

Replacing a core business information system can be a complex and time consuming exercise, but it really shouldn't be a life threatening operation. This is not a new science: as our six contributors have shown, there is plenty of real world experience to call upon. You shouldn't need to learn any lessons the hard way, but if you do find things aren't going as well as you expect, don't hesitate: find someone who's been there before you and seek their advice.

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