

# 19 Brilliant Ways to Promote ERP User Adoption



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Digital transformation has become essential to support people working remotely and to compete in a global, connected economy. That means upgrading business management systems has never been more important. And while ERP implementations have come a long way since the early days of multi-million dollar budget overruns and missed deadlines, they still require substantial financial and resource commitments from your organization.

To get the most impact from a business management solution, your team must understand and adopt the system quickly. Although today's software offers streamlined workflows and intuitive interfaces, even some tech-savvy employees tend to drag their feet during implementations.

So why is user adoption still such a challenge for organizations implementing new business management systems? There's no one easy answer. Employees may be resistant to change, training may be inadequate, change management may not have been well planned, or leadership may not be fully committed. In most cases, it's a combination of factors.

This white paper will share the knowledge gained through countless ERP implementations to help get your employees started on the right foot. Our team has shared best practices, critical warnings, and bright ideas to help you quickly realize the full value of your software investment. Read on to see how you can help your employees embrace change and take your organization to the next level.



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## Sections

1. Plan Thoroughly
2. Lead Proactively
3. Manage Expectations
4. Train Effectively



# Plan Thoroughly



## 1. Build an inclusive software selection team

Members of the ERP evaluation and selection team should represent a cross-section of your organization. In addition to leaders who understand the business objectives of the implementation, include staff members who can anticipate how the software will impact day-to-day operations. Ensure that each department or business unit feels their perspective is represented in the selection process.

### POTENTIAL ROADBLOCK

*"Don't have every employee involved in the decision making process. Choose a core group that understands the goals of the business and can focus on those rather than on the personal inconvenience that may come with changing ERP systems."*

– Joel Gress, SWK Technologies

## 2. Design the system to streamline current cumbersome processes

Take the time to clearly understand your business processes and re-design them to simplify and streamline your employees' work. Replacing tasks currently done on paper with digital processes that take just as much time won't win over your users. Design a system that will help employees accomplish more in a day with fewer headaches. Your implementation partner should be familiar with your industry and provide best practice examples to guide your workflows and business processes.



### BRIGHT IDEA

*"The number one thing we ask all our customers as part of kickoff meetings is to define the core goals. If you don't outline those goals, then you can easily lose focus as you move through the project. When people are resistant to change, you can go back to the goals of the project and explain the value to the overall business."*

– Joel Gress, SWK Technologies

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## 3. Plan ongoing support and training before go-live

Establish and communicate a clear plan for post go-live support and training. Users need to know that they will have help transitioning to the new system. Ongoing support and training will also keep users from establishing workarounds to avoid using the new system.

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## 4. Maintain key integrations and customizations

Don't expect users to manually transfer or enter data that the previous systems handled automatically. Missing features and missing integrations are serious obstacles that users may be unwilling to accept. Integrations with other systems and customizations that meet specific requirements should be addressed early in the planning phase of implementation.

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## 5. Map the employee journey

Before you define the data fields and workflows needed to improve your ERP system, you need to understand where you tend to lose time and productivity. By mapping your journey from start to finish, you can align processes to help guide your team—including triggers to launch automated processes focused on historic sticking points.



### BRIGHT IDEA

*"Some users are resistant to change because they feel the way they have always done it has worked. Maybe it worked for them, but that doesn't mean it worked for the company. We want to open doors to a new way of processing and a new way of sharing the information on the system."*

— Joel Gress, SWK Technologies

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## 6. Leadership must champion the project

All employees affected by the new system should have a clear understanding of why the project was initiated and the ultimate goal for the organization. The leadership team, from CEO to department managers, should be committed to that goal and be able to explain it clearly. Leaders should be supportive of employees efforts and remain fully engaged throughout the project

### POTENTIAL ROADBLOCK

*"If management says the project is important, they should allow the employees to have the time they need to make the project a success. If management is not behind it, then why should the employees bother?"*

– Joel Gress, SWK Technologies

## 7. Identify an internal project manager and key users

Before the project begins, identify a project team and project leader from within the company. All team members should be empowered to spend appropriate time on the project. That may require a reduction or reallocation of current responsibilities. The project team should be well rounded and include members from various parts of the organization. Perspectives from each team should be considered from the beginning.



### BRIGHT IDEA

*"In most cases, making it easier for users is really about reducing the number of clicks. So much time is wasted by employees going in and out of multiple systems and trying to correlate disconnected information. Simply reducing the number of systems, bringing it all together, is a huge win."*

– Joel Gress, SWK Technologies

## 8. Leverage “Superusers” and cheerleaders

A “Superuser” is typically an employee who is enthusiastic in learning and advocating the benefits of the new system. Superusers should be included or engaged by the project team to assist with training and communications. During the project, some team members will become cheerleaders for the project—embracing change and offering support. The project team should be on the lookout for these employees and have a plan and leverage their enthusiasm and knowledge to help others.

## POTENTIAL ROADBLOCK

*“If you make the process more difficult for the user, that can lead to a failure. Be sure that you don’t exclude key integrations, miss critical reports, data elements, or features.”*

– Joel Gress, SWK Technologies

## 9. Prepare to be flexible

During an implementation there are likely to be unexpected challenges and opportunities. Assure everyone involved in the ERP implementation project that changes are to be expected and will be managed thoughtfully. Project team meetings should address potential changes and leadership should be fully informed of possible impacts.



## BRIGHT IDEA

*“Painting the full picture of the project and making sure that the users understand the overall roadmap, the value to the company, and the value to them personally is a key part of user adoption.”*

– Joel Gress, SWK Technologies



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## 10. Maintain consistent, continuous communications

To keep everyone informed—from leadership to front-line users—establish regular communications channels. Project updates should be honest and informative to help users feel included in the entire process. Consider using a Teams site to promote discussions, answer questions and provide an “always-on” location for project information.



*“Projects that have a project lead on the customer side, someone that becomes a power user of the system, are more successful. They work with your team every day, and it keeps the momentum level high.”*

– Joel Gress, SWK Technologies

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## 11. Establish metrics for goals and expected outcomes

The defined goals of an ERP implementation project should be clear and measurable. With mile markers, the project team can monitor and report on success. As decisions are made during the planning and execution phases, defined metrics provide guideposts to keep the project aligned to the desired outcomes.

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## 12. Recognize the potential impact on employee workloads

An ERP implementation will require significant time from project team members and users. Employees should not be expected to maintain their full-time job responsibilities in addition to planning, testing and training. Put plans in place to offset workloads, e.g. reduce regular work, get support from other departments, hire temps, or some other method. Give employees the time they need to fully focus on their implementation assignments.



## POTENTIAL ROADBLOCK

*“I often tell my team that last little push for the goal line is like landing a plane. The most resistance to landing is when you are closest to the ground. It’s important to stick with your core goals, to get the system up and running, and once the system is in place, then you can expand.”*

– Joel Gress, SWK Technologies

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## 13. Explain the business case for the project

Spend time building a clear business case to help users understand why they are being asked to support the implementation of a new ERP system. By providing employees with the “why” as well as the “what,” leadership will establish a more inclusive environment that will promote user adoption.

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## 14. Promote patience and tolerance during the project

An ERP implementation project can be stressful for many of the individuals involved. Project teams must make difficult decisions that not everyone will agree with. Department managers will be facing additional stresses to get regular work done despite significant distractions. Users may be nervous about learning new systems or having their jobs become redundant. Everyone faces personal issues that may not be apparent. Patience and tolerance for missed deadlines or mistakes will go a long way in supporting user adoption.



### BRIGHT IDEA

*“We discourage customers from trying to make the new system look like their old system. When you implement a new system, it’s an opportunity for you to rework some of those old processes and make a fresh start.”*

– Joel Gress, SWK Technologies

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## 15. Provide an overview walkthrough before training

Help users understand the big picture so they can understand how their role contributes to the process. Explain the ERP processes—including flow charts if appropriate—that span across the organization to provide context for users. In addition to helping with the initial adoption of the system, a broader perspective may help users see how they can extend the system to streamline operations in the future.

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## 16. Address potential concerns of automation

Users will balk at learning a new system if they think it might replace their job or devalue their work. If automation will redefine their role, users need to understand precisely how they will fit in and what their responsibilities will be. Demonstrate how the new system will benefit them specifically and how their effective use of the application will make their work more productive and fulfilling.

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## 17. Use terminology and examples that employees understand

During training sessions, use industry-specific terminology instead of generic examples included in vendor training data. If your organization uses the term “bill” instead of “invoice” users could be confused. Populate testing and training data with actual company data to help employees identify with the situations. When using actual product or customer names, lessons are much more likely to be understood.



*“It’s important to realize that people learn in different ways. Some users want to read, some want to watch a video, and some need to have a live person train them directly. Work to understand what kind of training is needed for the individual groups within the organization and offer a variety of options.”*

– Joel Gress, SWK Technologies

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## 18. Offer a variety of training options and support

Support all learners by providing a variety of training options. Some people will prefer in-person, hands-on training and some will prefer to move at their own pace. Video recordings of live sessions support both paths and can provide a resource for new hires after implementation. Set up a Teams site that provides a central location for immediate and accurate answers and training-related discussions. Not only will it keep business moving during the cut-over, but it will also help end users feel supported as they work in the new system. Leverage superusers to help other employees in their business unit with on-the-job training and coaching. Superusers provide a familiar face to answer questions and help with troubleshooting.



*"It works well to introduce a little bit of peer pressure. We create a series of public reports and dashboards that shows which users have logged in, how often, how many transactions they have processed and more. Usually, by the second meeting after we show these dashboards, we see a dramatic shift in the adoption rate."*

– Joel Gress, SWK Technologies

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## 19. Take full advantage of video communication

As the number of people working remotely continues to climb, the value of video training and communication has increased. For most organizations, user testing and training sessions will include employees working from home. By hosting sessions in real time with a tool like Microsoft Teams, you'll enable two-way communication that can provide valuable visual feedback. Facial expressions and body language are key indicators of users' comprehension and adoption as they participate in training sessions.



# When it comes to user adoption, experience counts!

At SWK Technologies, we have a process that works. We take the time to help you define your goals, make a plan, and implement a system that brings value to every user in your organization.

We are one of just five companies worldwide that have three Acumatica MVPs on staff. Our combined experience and proven methodology will help you to get the best return on your investment.

We feel strongly about the value of community. Our team supports our customers, and the entire Acumatica user community through user groups, presentations and events. We want your team to be enthusiastic users of Acumatica and continue to collaborate and grow for years to come.

Contact us to learn more about how we can help your organization at:

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or  
via e-mail at [info@swktech.com](mailto:info@swktech.com).



*"At the end of a long and disappointing search to modernize our legacy systems, we finally found Acumatica and Dynamic Tech Services (now SWK Technologies). Their guidance on initial setup and ongoing support gave us the confidence to create an amazing solution supporting our most challenging business requirements."*

– Brian Stevens

SETECH Supply Chain Solutions, LLC



# About SWK Technologies

SWK Technologies is a business solution provider specializing in business process automation through the use of **Acumatica Cloud ERP** and related products.

With a focus on delivering ERP (**Enterprise Resource Planning**) solutions to the middle market, we provide support to approximately 400 installations in 25 countries and 35 US states.

SWK Technologies can help you choose the ERP system that best fits your business, implement and train you on that system, support you when you have questions, and provide custom solutions when the standard software is not enough.

Learn how Acumatica can work for your business by visiting us online at [swktech.com](http://swktech.com) or by calling 877.979.5462.

