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Why Every ERP Project Needs a Champion



Acumatica has been implemented all around the globe, with companies large and small reaping the benefits of industry-leading cloud-based ERP functionality. Each company implements its new system according to its own needs and capabilities, of course, but we've noticed that some implementations go smoother, faster, or are more successful than others.

To better understand how they were able to do this, we asked three project leaders, individuals we call "champions," what they thought was most important for the success of their implementation.



Champion 1: Cliff Walters

Cliff Walters is an ERP veteran, having been involved in a number of implementations over the course of his management career. Walters has seen firsthand how important it is to have strong executive leadership in any company undertaking a project as important as a system implementation. Every project needs a leader – a *champion* – that can bring executives and workers, the project team and the future users of the system together for the successful execution and completion of the project.

Walters talks about a time when he was a department manager at a large financial services company a few years ago, when the auditors pointed out that their current system was, well, not current. Major shortcomings were inhibiting

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significant parts of the organization from operating effectively and the system lacked reporting and analytical capabilities that were becoming more and more important to the business. It was time to look for a replacement – it was determined that it was not practical to upgrade or expand the existing software to bring it up to where it needed to be.

Every project needs a leader — a champion.

Since Walters had previous project management experience, he stepped up to the plate and volunteered to lead the system replacement project. He knew from experience that the first order of business would be to secure executive team commitment.

"It really has to come from the top," Walters says, meaning the project absolutely needs a clear and obvious (visible) commitment from senior management including the CEO. And not just to get the money and resources needed to go forward. That commitment has to stay front-and-center through the entire project.



Champion 2: Francisco Callegari

When Francisco Callegari was hired as CIO at Guardian Sealtech, he already knew that the company's systems were totally inadequate and his first responsibility would be to select and implement a replacement. Callegari also understood that ERP selection and implementation has to be user-driven.

"IT is not the owner of the project," he says. When IT takes the lead, it can be difficult to build interest ownership in the users. Resistance and non-acceptance can hamper the success of this "computer project."

IT is not the owner of the project. The key to success is to enlist the right people with the right know-how.

But Callegari knew that the company CEO and executive team were fully onboard. They knew that the existing system was inadequate and the new system would be an essential tool to support planned operational growth. Callegari's role was threefold: facilitator, cheerleader, and trusted advisor. "Users and executives must trust the IT team leader," Callegari says. "They have to know that IT will do what needs to be done and will support their decisions and needs."

Callegari views his role as IT-based project leader as being an "invisible hand" working closely with the executive team to be sure that the new systems are aligned with the business and with key experts from each department to identify and resolve their specific needs. The key to success is to enlist the right people

with the right know-how. The business "owners" make the selection and do the work of implementation; the system will become their everyday tool. The implementation isn't finished until everyone is using it every day.



Champion 3: Simone Cassar Parnis

Simone Cassar Parnis, Financial Manager for Azure Services in Malta, played a similar role in her company's new system selection and implementation but with a slight twist: while Cassar Parnis was the internal "invisible hand", the putative project leader was Chief Information Officer (CIO) Marthese Vella working closely with Computime, an outside partner, to do most of the heavy lifting on the IT side.

"The whole project was very structured," Cassar Parnis says, "and well-managed thanks to Computime's expertise and experience. But the users were involved from the very beginning." She points out that early involvement is essential: "They will be the real champions. They will contribute 80% or more of the time required to implement the system – a lot of extra effort."

The project champion is the primary link that keeps the information flowing.

A lot of what the project champion does involves communicating up and down the corporate structure, helping to make the executive commitment visible to the team and the all future users of the new system, and keeping the executives informed of the project's progress, accomplishments, challenges, and needs. It's a two-way street and the project champion, no matter his or her actual position in the company or designated role in the project, is the primary link that keeps the information flowing.

Linking Executive Initiatives to the User Community

In all three of these examples, the executive team understood the need and the importance of the system change so they were fully committed right from the start. As the project leader and champion, Walters was able to carry the weight of that endorsement forward into the project. Similarly, both Callegari and Cassar Parnis acted from less visible positions to carry that message to the user community: this project is critical to the company's continued success and we (the executives) are fully in support.

Perhaps the biggest challenge for a project of this kind is getting the extra effort required from the extended project team; that is, the core team plus the future users who will be asked to help select, implement, test, and learn to use the new system. “In essence,” Walters says, “we’re asking these people to step up and work another half-time job, in addition to completing all their regular duties. It may look like a part-time job but it takes a full-time commitment.” That simply won’t happen unless the effort is recognized and appreciated. It’s the champion’s job to make sure that happens.

About the Project

The most important thing is to be able to organize, plan, and manage the effort.

The project itself can be viewed in two parts: system selection and implementation. The details of each phase are not important to this profile – only that the project team had to be well-organized, made up of key stakeholders who would take responsibility for the successful completion of the project, and that the project leader was responsible for keeping it all moving.

The initial selection phase can be demanding (sorting through the many ERP systems on the market to come up with a manageable few to investigate more thoroughly). The team has to identify a reasonable number (typically 5 to 8) viable candidates based on general requirements, then whittled down the list to about three that merited serious vetting. The final selection, negotiation, and contract mark the transition from selection to implementation.

As for the actual implementation project, Walters notes several key requirements to ensure success.

“It’s a project, and the project leader must have project management experience. It’s not something you can learn on the fly. It doesn’t necessarily have to be ERP implementation experience. The most important thing is to be able to organize, plan, and manage the effort.”

Another requirement, in addition to the executive commitment mentioned above, is the authority and awareness to quickly identify and resolve any issues that inevitably arise along the way.

“Whenever a constraint or ‘blockage’ enters the picture,” Walters says, “it’s important to address it right away because it not only threatens the overall

plan and schedule; it is also likely to have a bigger impact the longer it remains unresolved." Once again, the open path to the executive suite is essential to quickly resolve any problems that come up. An experienced project leader is the focal point for the project from the very beginning – getting executive commitment and involvement – through the final completion of the project and successful transition to the new ERP system.

An ERP project doesn't end with "go live." The implementation isn't finished until everyone is using it every day.

And remember that an ERP project doesn't end with 'go live'." At that point, you've probably just replaced old functions with equivalent new functions. To really get the benefits of your investment, you need to start using the additional capabilities that the new system brings to the table – those things that were missing in the old system that were the main reason you decided to make the change.

"We're still learning," Cassar Parnis says. "We are already enjoying the increased functionality and the time savings that the new system provides, but we know there is more that we can do with what we have already installed – and more potential for expansion at a later time."

And the champion doesn't stop: "We know there is more we can do."

The project leader/champion is responsible for maintaining the interest and enthusiasm in the team that brought the initial implementation to successful completion. An ERP implementation is never really "finished." There is always more than can be done; more applications to activate, more functions to learn and incorporate into the business, and new capabilities that the ERP supplier will be adding as the system grows and matures.

ERP by its very nature is destined to grow and change as does your business. Every company needs an ERP champion to keep that vision alive and lead the company forward to new competitive strengths from smarter, better information management.

Summary

The project leader is your facilitator, cheerleader, and trusted advisor.

It is clear that the most successful projects all have top level management that is fully committed to the project and visibly supports it by staying in tune with project progress keeping their involvement visible to the team and the entire company. Even though IT is an important participant in the selection and implementation of the system, they should not be the designated leaders – project leadership must come from the operations side of the business. After all, the users will have to live with the results and they will also dedicate the majority of the time and effort needed to bring the project to completion. They must think of the new system as their own; that encourages the full commitment and 'ownership' interest that carries them through the extra effort required to incorporate the system into their daily routine.

The project leader role is, above else, a communication job, coordinating the goals, vision, and progress between the executive suite and the working levels of the organization. In the words of Francisco Callegari, the project leader is a "facilitator, cheerleader, and trusted advisor."

The true ERP champion drives the effort forward and takes responsibility for achieving the goals but the best ones do that from a less visible position. They are not in it for their own glory; they make sure that the people who actually do the work and make the progress get the recognition they deserve. Achieving the goal of a successful implementation is what they care about the most.

Learn how Acumatica can work for your business by visiting us online at swktech.com or by calling 877.979.5462.

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