

# TEN TIPS FOR A SUCCESSFUL INFOR IMPLEMENTATION

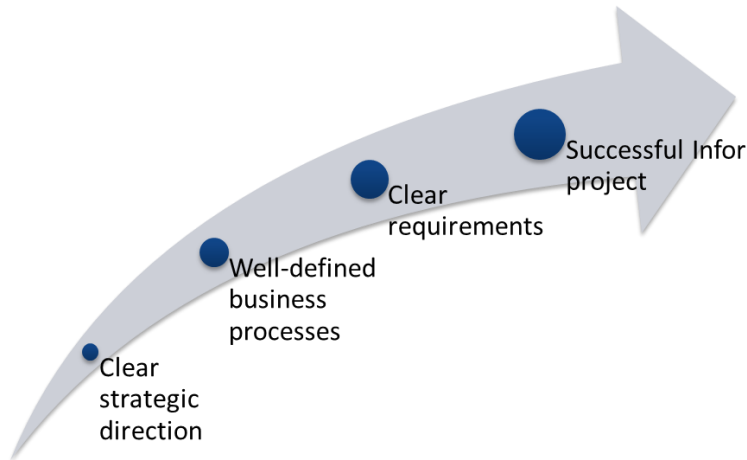


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## CONSULTING SOLUTIONS

Successfully implementing an Infor ERP system involves clear requirements, well-defined business processes and a clear strategic direction – this all begins before implementation. Even before selecting an ERP system, organizations should analyze exactly who they are as an organization and what they want to be in the future, as well as pinpoint their strengths, weaknesses and core competencies.



There is no question that any ERP implementation can be difficult. While envisioning ideal scenarios is important, organizations must consider the risk factors and components specific to their business that can materially affect the implementation.

### Risk Focused

A smooth Infor implementation entails a level of business and technical risk. Certain factors can add to an implementation's level of risk, including lack of executive commitment, unclear goals and / or a poorly defined methodology. Other risk factors include integration with existing systems, data cleansing and migration, system stability, demand on hardware and networks, system compatibility and deployment options. Organizations must assess these risks as early as possible to avoid additional costs, timeframe overruns and overall organizational instability.



### **Vertical specific**

An effective Infor implementation will avoid the traditional “one size fits all” approach. Because Infor solutions are specialized by industry, the implementation methodology should also be guided by vertical specific implementation methodology standards.

### **Waterfall or Agile?**

There are scenarios where an Infor implementation requires a highly disciplined, sequential approach where all steps are laid out, dependencies are mapped and the project moves to the next stage only after the previous one is completed. This methodology is referred to as the Waterfall approach.

There are other Infor implementation projects that require adaptability and flexibility when a fast and flexible approach to project management is based on principles of collaboration, adaptability and continuous improvement. This approach is commonly referred to as an Agile methodology.

There are still other Infor implementation projects that require a combination of both Waterfall and Agile methodologies. When implementing an Infor solution it is best to be aware of whether Waterfall, Agile or a combination of the two approaches will be most effective.

### **Standards-based**

ERP implementation and deployment methodologies vary but the most effective approaches are standards-based, providing a universal deployment language for the entire Infor ecosystem. This standards-based approach delivers predictable results and lower-cost implementations.

### **Business processes defined in expedited fashion**

ERP vendors and systems integrators recognize the need to focus on clearly defining business processes and in this regard, Infor is no different. Many ERP vendors fall into the trap of confusing the strategic level business process discussion with data-driven issues. For example, what values should appear in a drop down box or what colors or fonts should display on a screen. Infor has adopted the concept of “Action Labs” which enables them to de-couple the pure business-defining work from the more tactical tasks such as determining what data values to use to populate a system.

In reality, this means that Infor will run a series of business process modeling workshops (i.e., Order to Cash) and then will separately conduct a highly focused Customer Master Action Lab to rapidly define the values for customer codes, status, reporting, etc. The result of this approach is that a client’s future state business processes can be defined up to 60% faster.

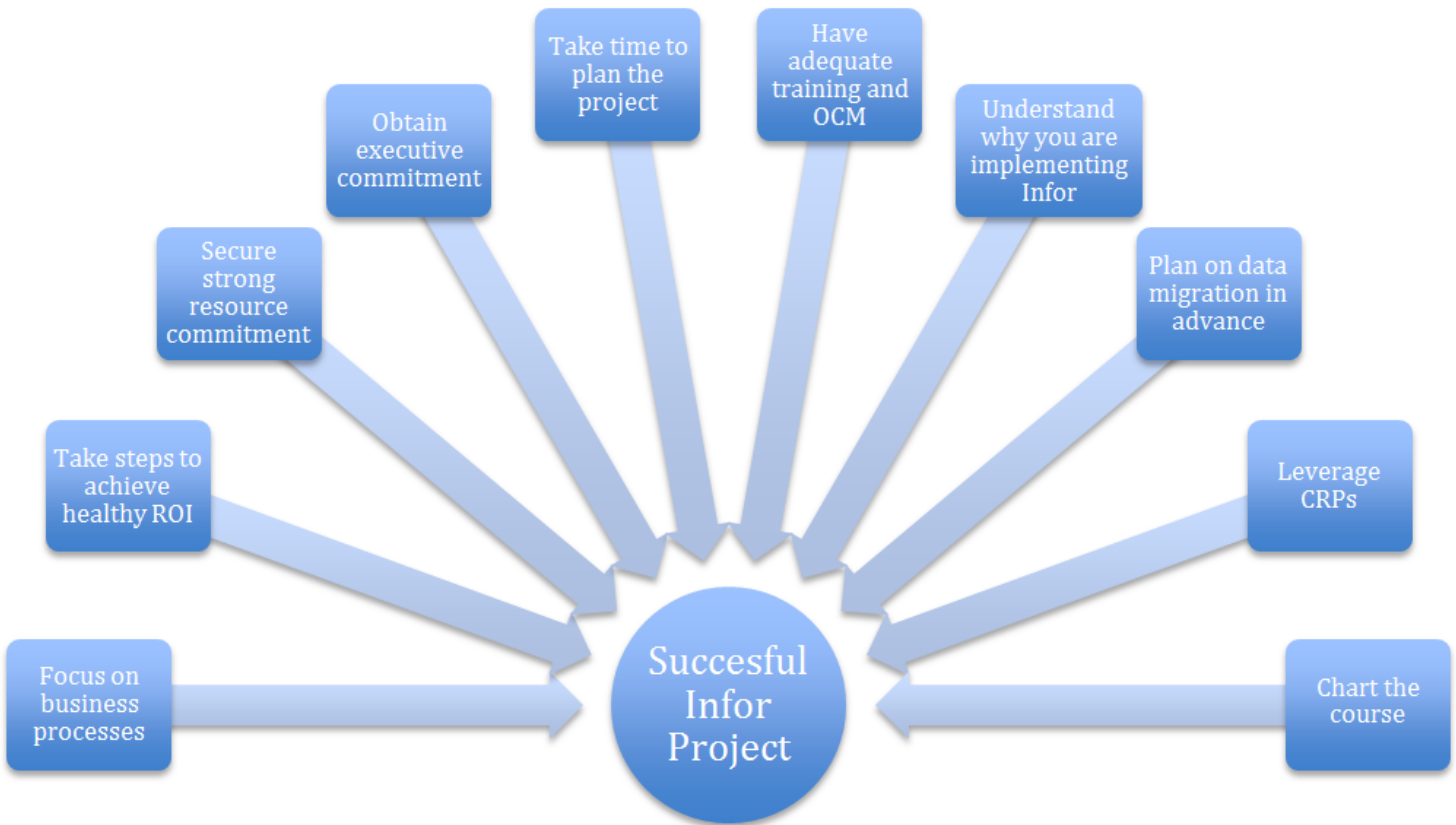
## Ten Tips for a Successful Infor Implementation

Stories of ERP projects gone wrong are found across all industries and all ERP systems. Many organizations that have experienced ERP failure have brought publicized lawsuits against ERP software vendors and, in a few extreme cases, these companies filed suit because of their belief that a malfunction with the software caused a complete disruption to their business operations. To effectively manage an Infor initiative and avoid an implementation failure, organizations should consider the tips on the following pages.

- 1. Focus on business processes and requirements first.** Before deciding to upgrade or select an Infor solution, organizations should conduct requirements gathering workshops, focusing on the essential business processes that the software must address. Providing ERP vendors with a detailed and specific demo script ensures that vendors demonstrate the software functionality that relates to your business processes. Tell the vendor exactly what you want and it shouldn't be difficult to determine if their software is right for you. Along the same lines as functionality, make sure the vendor addresses the specific products that are tailored to your industry vertical and inquire about vertical-specific implementation methodologies. Implementing an industry-specific product and employing vertical-specific methodologies will eliminate the need for customizations and simplify upgrades.
- 2. Take measures to achieve a healthy ROI.** Maximizing business benefits means setting goals. Without goals, nothing can be achieved because nothing can be measured. The ERP implementation goals of many organizations include selling more, saving money or protecting their software investment through upgrades. Before implementing an Infor solution, companies should define their organizational goals and tie these to their implementation goals. Defining goals and performing a value assessment can help organizations develop a business case outlining the benefits they expect to receive from an upgrade or from new software. A business case can also be used to outline key performance measures, set baselines for those measures and track performance after go-live.
- 3. Secure strong project management and resource commitment.** Behind every well-managed Infor project is a strong project manager and a team of in-house subject matter experts. Guided by the project manager, the project team should develop a risk management plan along with mitigation steps and ongoing phase reviews. Choosing a project manager based on his or her communication skills in addition to their IT skills will ensure that the project team receives the information and encouragement they need to stay motivated and committed.

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- 4. Commitment from company executives.** An Infor implementation needs support from top-management and C-level executives. Regular project reviews with executive or steering committee members can help project managers demonstrate business benefits and ROI as well as continually justify the value of investing in an Infor system or upgrade. Executives are more likely to support an ERP implementation that is driven by company goals so the project team needs to be upfront about benefits as well as risks and mitigation steps. In the case of an Infor implementation, executives are especially going to value the long-term benefits of highly flexible architecture that won't require heavy modifications and won't be broken when new applications are added. Remember to update executives on these long-term benefits, as well as the short-term achievements.
- 5. Take time to plan up front.** Regardless of whether the vendor in question is Infor, organizations should take the time to validate the vendor's implementation plan and make sure the vendor understands their organization's business requirements. An implementation plan should include resource projections as well as accurate budget and timeline estimates. Perhaps most importantly, the plan should address communication and training expectations for all stakeholders. Budget and timeline overages are most common among organizations that neglect to plan for essential project activities such as organizational change management.

- 6. Ensure adequate training and change management.** Training and communication are critical components of a successful Infor implementation. In order to assess and mitigate risks, organizational change management activities should be built into your Infor implementation plan. This will help your organization prepare for potential issues such as change resistance among end-users as ERP systems can create panic if employees do not understand how to use new software. To clarify expectations and secure commitment, the project team should regularly communicate with all stakeholders including executives and end-users.
- 7. Understand why you are implementing Infor.** It is easy for organizations to decide to implement a new solution because other organizations are doing so. By clearly defining business objectives, organizations can make more educated decisions. Will an Infor solution help your organization meet its business objectives? Does the system align with your organization's business processes without extensive configuration? Does the system offer the deployment options best suited for your organization and are those options deployed with industry vertical-specific methodology guidance? These are questions organizations should ask before selecting and implementing an Infor system or upgrade.
- 8. Focus on data migration early in the process.** Data migration is complex and entails a certain level of business and technical risk. The level of this risk depends on the number of sites implementing ERP, how many legacy systems are being replaced and how many users are involved. Organizations should define a data migration strategy before implementation and begin scrubbing and mapping data to their Infor system as early as possible. Because Infor solutions feature highly flexible architecture, this data mapping is easier than it is on rigid monolithic ERP solutions. Still, care must be taken to fully understand and pre-plan the new strategy in order to ensure a smooth transition.
- 9. Leverage the value of conference room pilots (CRPs).** Before an ERP system goes live, many organizations perform functional and integration testing to ensure the software works and data flows accurately through the system. This testing can be performed in a series of conference room pilots throughout your Infor implementation. During CRPs, organizations should leverage the following non-technical factors:

  - Well-defined business process and workflow definitions help communicate with end-users and train employees on the new system.
  - Business process and workflow gap analysis tell employees how the “old way” relates to the new workflows.
  - Organizational change and impact analyses and targeted internal communications help employees assimilate to the changes.
  - Two-way communication helps identify and mitigate pain points related to the new system.
- 10. Chart the course.** An Infor implementation requires clear communication to all stakeholders that addresses the project's purpose and expected benefits. Using

a project charter, organizations can clearly define company objectives and implementation goals such as lowering risk and saving money. The charter should include all expected business benefits as well as upcoming organizational changes. It should also address any questions employees may have so they know their role is essential to ERP success. The ease of use of Infor solutions often encourages employees to become more engaged in the implementation and want to take an active role in defining best practices and workflows.

## Three Tips for a Successful Infor Upgrade

Perhaps your organization has already implemented an Infor system and you are deciding how and when to upgrade. During this process, your organization should consider the following tips.

- 1. Quantify the value of upgrading.** Many organizations choose to upgrade in order to modernize their Infor system and stay competitive. The value of upgrading can be determined through an ROI analysis and a detailed business case that quantifies the specific benefits your organization hopes to achieve through an upgrade.
- 2. Research the features.** Infor has a number of upgrade packages to choose from. Their latest package, Infor 10x, has a variety of features including an enterprise collaboration platform, ease of integration, automatic upgrades, mobile functionality and industry-specific functionality. Taking advantage of these capabilities is facilitated with the Infor Upgrade X program, where everything required for an efficient upgrade to Infor 10x is provided. This includes ROI analysis, implementation, application hosting, on-going support, education and upgrades.
- 3. Verify your vendor's and implementation partner's methodologies.** The ideal implementation methodology will include activities such as building a prototype, conducting conference room pilots, performing gap analyses and testing functionality and integration. An effective implementation methodology also involves organizational change management and business process reengineering.



## Conclusion

ERP implementations across all industries and vendors often fail to deliver many of the business benefits that organizations expect. By understanding common implementation challenges, organizations can effectively plan for and mitigate risks while following a strong, industry-specific methodology. It is important to realize that many implementation challenges are less about technology and more about process and organizational change management issues. Aligning ERP software with your business processes, setting a strategic direction and defining requirements is critical to overcoming challenges and achieving ERP success.

When developing or analyzing an implementation plan, organizations should insist the following elements are included:

- **Project Initiation:** Complete team structure definition, define business requirements, communication planning, risk management and governance and control
- **Execution:** Data migration, training strategy, communication, business simulation, gap analysis and process testing
- **Close:** Cutover strategy, verification, transition planning, communication, go/no go decision, SOX testing and legacy data archive and system de-commissioning

## About Panorama Consulting Solutions

Panorama Consulting Solutions is an IT consulting firm specializing in the enterprise resource planning (ERP) market for mid- to large-sized organizations around the world. Independent of affiliation, Panorama facilitates the evaluation and selection of ERP software, manages ERP implementation, and expedites all related organizational change to ensure that each of its clients realize the full business benefits of their ERP systems.

More Information can be found on its website, [Panorama-Consulting.com](http://Panorama-Consulting.com) and Twitter feed, [Twitter.com/PanoramaERP](https://twitter.com/PanoramaERP).