Implementing an ERP system is a complex process; it takes confident solution selection, thorough planning, skilled implementation, and ongoing training and support. Each phase lays the foundation for the next. Shortchanging or rushing through any of the steps can transform what should be a beneficial business initiative into a fire-drill exercise in crisis management.

To help, we've identified what we feel are the eight essential elements of a successful solution implementation.

**Confident Selection**

1. **Capture Detailed Requirements**
   
   Your team is so familiar with your business processes that requirements gathering often results in only high-level items, but a quality implementation and finding the best fit solution for your business needs is in the details. Probe deeper by conducting a series of group interviews with key stakeholders across all departments in your organization, fostering a synergy around your solution selection process that will bring those detailed requirements to the surface. Stepping through use cases and discussing what-if operation scenarios is another beneficial technique during these stakeholder discussions to gather thorough system requirements.

2. **Choose the Right Solution**
   
   Even good, detailed requirements won't ensure that you always choose the right solution. Vendor websites tend to provide overly simple and generic demos to explain their product, but challenge vendors to prove they are the best fit solution for your business by asking for custom demos tailored to your processes, not their bells and whistles.

**Thorough Planning**

3. **Balance Budget & Resources**
   
   Naturally, your project's budget will increase as the vendor assumes more of the activities for your ERP implementation. On the other hand, a vendor can train your resources to assume activities such as data conversion or end-user training, effectively lowering your overall budget. However, if you choose to assume some of these responsibilities, be prepared for the timeline to complete your new ERP project to be drawn out.

4. **Flex Your Change Management Muscles**
   
   Your leadership team needs to leverage strong change management skills to efficiently transition your people to your new business management system and processes. From understanding your staff's acceptance and adoption levels to effectively training for skill levels and introducing gradual adjustments, change management is an essential aspect to rolling out a new business solution. Anticipate and prepare for some of your team to be excited while others will dread the process changes.
Skilled Implementation

5 Own Your Data

Data conversion is more than just a technical process for a vendor to handle; it is also a business process requiring strong involvement from your organization. Work with your vendor to develop data mapping and conversion rules to fit the new data schema. You will not only develop vital expertise needed to manage your data in your new ERP system but also ensure that all important information is included in the roll-over.

6 Don’t Skimp on Status Updates

You have initiated weekly status meetings for a reason; undertaking a new ERP project is complicated. Complex projects can reap high rewards, but they can also be susceptible to risk. Unexpected issues can be discovered when everyone provides a status update. You want to keep everyone on the same page and in sync with next steps to keep your implementation on track.

Go-Live Support

7 Conference Room Pilot (CRP)

A conference room pilot is a practice event to walk through mission-critical processes before going live with your new implementation. This is the final verification process of a new business system, and it is important to go into this test environment prepared. Develop a checklist highlighting processes that have changed to make sure there are no uncertainties and ask plenty of question. Your CRP is the warm-up to ensure a strong performance at go-live.

8 Life After Go-Live

Commitment becomes official at go-live. Keep in mind that there will be questions that arise about those infrequent, one-off procedures, and you will need to make adjustments along the way as your team dives into the solution. Staying consistent is important at this stage; users will have forgotten some of their pre-cutover training, and they will dismiss any processes or policies that aren’t enforced in the live environment. It is often beneficial at this phase to invest additional time and resources to post-implementation “recap” trainings, ongoing change management strategies, and initiatives to encourage user adoption across your organization. Making this commitment early will ensure a strong performance after go-live and create the foundation for a long lasting relationship with your new business management software.

Whether you drive the project completely in-house or look externally for a reputable ERP partner to keep things running smoothly, keeping these eight areas in mind as you undergo your next solution implementation will set the stage for a successful experience.