

Enterprise Resource Planning

Implementing ERP Systems

AAPA Port Operations, Safety & Information Technology Seminar

June 11, 2009

Panel: Jim Eldridge, Steve Rauch, Dave Sleight

ERP Project Phases

Pre-Implementation

Implementation

Post-production



Pre-Implementation Overview

- Project Governance
- Establishing the Project Team
- Vendor Selection

Project Governance

- Executive Support
- Management Support
- “Northbound Train”/”Getting on the Bus”
- Project Team Members

Establishing the Project Team

- Executive Sponsor
- Project Leader
- Representatives from each group impacted
 - No implementation without representation
 - More impact, potentially more representation
- Vendor representative(s)

Project Charter

(At Minimum)

- Why are you doing this project
- What's the expected outcome
- When is it expected
- How many resources does the team have
- Who is on the team
- Where is the project located

Vendor Selection

(Among Other Considerations)

- Request for Proposal Package
 - Rules for procurement
 - When proposals are due
 - How will the vendor be selected
 - What is desired
 - Current environment

Vendor Selection

(Among Other Considerations)

- Difference between “Can you” and “How do you”
- Short list
- Give vendors the scenario you wish to see
- All project team members view the demos

Vendor Selection

(Among Other Considerations)

- Contract Finalization
 - How will they be paid
 - What milestones must be reached, if any, to be paid
 - What is the project schedule
 - Who owns the results
 - What happens if the project fails

Pre-Implementation

Additional Comments by Panel

Implementation Overview

- Project Management
- Integrator Roles and Responsibilities
- Training
- Configuration, Development, and Testing
- Go-Live

Project Management

- Strong project management skills required
- Project portal
 - Schedules and calendars
 - Change Requests
 - System and project issues
 - Go-live checklists
 - Documents, links

Integrator Roles and Responsibilities

- External project manager - overall project plan and consultants
- Internal project lead - assist with plan, gather requirements, obtain user buy-in, coordinate users for acceptance testing, work with development staff
- Look for strong technical from your vendor
- Configurations and Gap analysis

Training

- Project leads become Subject Matter Experts
- Functional users – formal training and prototyping sessions
- Development staff must master complex environment as well as functional components

Configuration, Development, and Testing

- Use in-house development staff; support after go-live
- Cycle (development -> unit testing -> “consultant” testing -> end user/acceptance testing -> ready for production -> System testing)
- Multiple environments: Prototype/Development, Test, Production
- May be steep learning curve for Tech staff
- Regular development meetings
- Development should include knowledge transfer and documentation

Go-Live

- Conversions
- Development of go-live checklist with assigned responsibilities and due dates
- Select a “Go / No Go” date
- Consultants on-board for transition of support, issues
- Consider support model during and after go-live

Implementation

Additional Comments by Panel

Post-Production Overview

- Post go-live Support
- Ongoing Training
- Maintenance and Support
- Patch Management

Post-production Support

- Congratulations!
- Stabilization and optimization phase
- Continual process and system improvement
- Ongoing activities
- Hand off process from implementation team to management team
 - CRITICAL REVIEW: Implementation Team and Vendor project close out
 - Examine and approve implementation close out

Post-production Support

- Training for support staff should have already occurred
- Users group formation
- Consistent updates and patching notes
- Service Level agreements established
 - Support contracts in place
 - Accounts established
 - Communication lines and process established and understood

Post-production Support

- Bug Tracking and Fixing
 - Communications to audience
 - Process: Identification of System bug, customization issue, broken or designed that way
 - Migration of enhancements to maintenance and support

Ongoing Training

- Technical Staff
- User Groups
- Internal vs External training
- Consistent Communications
- Tutorials, FAQ's, Instructional Videos, attendance of user team meetings

Maintenance and Support

- Schedules
 - Backup schedule
 - Maintenance windows
 - Change process for timing of releases
- Process change
 - Core enhancements
 - Upgrade evaluations
 - Functional extension planning
 - Upgrade/enhancement acceptance/handoff process

Patch Management

- Change Management Board (Change process management)
- Service Desk Support
- Subscription or Notification Services from application provider for notification

Post-Production

Additional Comments by Panel

Audience Q&A

