

Building an ERP Taskforce

HOW TO SELECT THE BEST TEAM TO ENSURE SUCCESS

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The first step in any ERP installation involves bringing together the team who will plan and implement the project.



In this whitepaper, you will learn how to select the right people for your taskforce and get them focused on accomplishing your ERP goals and objectives.



Assembling The ERP Taskforce

In small companies (10 employees or fewer), everyone needs to be involved in some facet of the implementation. Accordingly, the ERP taskforce should include everyone in the company to some degree. When every person “owns” a piece of the software, the whole company buys into the ERP process and the implementation goes much smoother. This doesn’t mean that every employee needs to learn the entire software. However, each individual should be responsible for learning and training others on at least one specific area.

In larger companies (10 to 100 employees), assembling the taskforce requires a bit more care. Every department or critical business activity needs to be represented on the taskforce. However, team members need to bring more to the table than just technical expertise in their specific areas. In general, the best ERP taskforces share the following characteristics:

- All critical business activities — such as sales, accounting, operations, purchasing, and shipping— have at least one representative on the team.
- The people on the taskforce are liked and respected within the organization.
- Team members have strong technical knowledge/expertise in their specific areas and have a good understanding of other parts of the business.
- Team members are truly excited about the project.
- The taskforce includes a combination of management and line people.

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Assembling The ERP Taskforce

In companies with more than 100 employees, the taskforce will usually consist of the owner/CEO and the major department heads, such as the head of sales, accounting, operations and purchasing. However, in this situation, the department heads should not do all the work. Instead, they should form sub-teams for their specific areas and delegate much of the hands-on learning and training to their people. Taskforce members still need to learn and use the software, but their primary responsibilities are to plan the implementation, set goals and deadlines, and hold others accountable for following through.

Regardless of company size, every taskforce should have an ERP “expert,” one person who gets involved with every facet of the software and becomes the primary source of information when issues arise. Ideally, this expert will come from operations, because that is the area most impacted by ERP software. In addition, your ERP expert should be someone that employees like, respect and trust. Avoid authoritative or autocratic personalities, even if they have strong technical skills. Instead, select someone who communicates well, excels at building relationships and willingly shares information with others.

The taskforce also needs a “champion,” a senior manager who has the authority and responsibility to hold people accountable and make things happen. In smaller companies, this is usually the owner or CEO. In larger companies, it can be the CEO/owner or a trusted senior manager who believes in the project and has a track record of producing results. Again, the person should be well liked and respected throughout the organization, and should have a knack for getting people from different parts of the company to work together.



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What Does The ERP Taskforce Do?

Once assembled, the ERP taskforce oversees a variety of important activities. These include:

- Researching, evaluating and selecting the appropriate ERP software package
- Setting goals and objectives (such as improved on-time delivery, better inventory management) for the ERP initiative
- Working with the ERP vendor to create and execute an implementation plan
- Communicating the need for the ERP software and the benefits of using the new system
- Scheduling training
- Following through on the plan and holding people accountable

Most taskforces do a good job in the planning and implementation areas. However, many fall short in the accountability area, especially when trying to implement ERP in a company operating at full or close to full capacity. When given a choice between getting the product out the door or learning a new software, employees will invariably choose getting the work done. Even when the workplace isn't quite so hectic, people generally prefer to do what they already know how to do as opposed to learning something new.

Therefore, when setting up the training schedule, the taskforce needs to build in plenty of time for learning the new system and experimenting with it before going live. Once it establishes the deadlines, the taskforce then needs to hold people accountable and stick to the timeline as closely as possible. Even if the timelines require adjustment along the way, as is often the case, the taskforce still needs to ensure that all the steps are followed in the implementation plan.

After Going Live With ERP

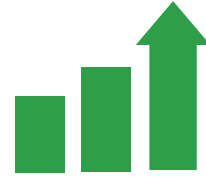
Implementing ERP involves an ongoing process, not a one-time event. Therefore, it's important to keep the taskforce together long after the "go live" date has come and gone. In some cases, it may be appropriate to reduce the size of the team. But do not allow it to disband simply because the new system seems to be working smoothly.

Why keep the team together? Because even after going live, you still need to champion the project. Without ongoing support from the taskforce, people will stop learning new skills on the system, or worse, will begin sliding back into the old ways of doing things. In addition, ERP vendors are continually upgrading their products. If you stop training, people won't be able to take advantage of new features on the system. Also, when people change positions or new employees come on board, you need a system in place to quickly bring them up to speed on the software. Keeping the taskforce intact, even if at a minimum level, will help to ensure that these essential activities take place.

After going live, the focus of the taskforce switches from ensuring that people are trained on the basics of the system to training them on more advanced features and making sure the system continues to work smoothly. This includes activities such as:

- Tracking and posting productivity improvement and cost-reduction reports
- Scheduling training on new modules or product upgrades
- Tracking performance against the goals and, when appropriate, setting new goals
- Rewarding success at the individual and organizational level

For many companies, implementing ERP signals a shift in culture and the start of a process of continual improvement. Keeping the taskforce together on an ongoing basis will help to solidify your initial implementation efforts and boost your chances of making real long-term improvements in the most important areas of your business.



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Avoiding The Speed Bumps

When assembling your ERP taskforce, beware of the following:

- **POLITICS/TURF WARS.** To prevent political issues from derailing the implementation effort, don't place people on the taskforce who seem overly protective of their turf. Also, avoid people who won't share key information with others.
- **ERP "GURU" SYNDROME.** Every company needs an ERP expert, someone that people can go to for information and answers. However, all the knowledge and expertise regarding the system should not reside in one person. In larger companies, avoid having one person in charge of any specific module or area.
- **MANAGEMENT-ONLY TEAMS.** The best ERP teams consist of a mixture of management and line people. When people on the shop floor see one of their own doing the training, they're much more willing to go along with the new system.
- **PUTTING IT IN CHARGE.** IT plays an important role in the process, especially when it comes to addressing hardware and systems issues. However, they generally lack the big picture perspective and operational expertise necessary to drive the implementation process.

The quality of your taskforce plays a major role in determining the success or failure of your ERP effort. Select team members carefully, keep them focused on the task at hand, give them the authority and resources to get the job done, and you will greatly increase your chances of a successful implementation.



ABOUT THE AUTHOR

[Dusty Alexander](#) is President and CEO of Global Shop Solutions. Since joining the company in 1990, he has played a leading role in new product development, with a special emphasis on customer-driven applications and customer success.

Dusty has been instrumental in Global Shop Solutions' growth and development as an innovative leader in the ERP software industry. Under his direction, the Company has increased sales every year, and has grown into one of the largest privately held discrete manufacturing ERP software solutions companies in the United States.

Dusty is actively involved in our customers' increased benefits derived from the software. Through his dedication, Global Shop Solutions has earned a reputation for outstanding customer service, superior training and highly successful product implementations.

To learn more about how to build your ERP taskforce, call 1.800.364.5958 or visit www.globalshopsolutions.com.

