

How to Prepare for an Acumatica Implementation

ERP Implementation



ERP Implementation

Why it's Important to Have a Plan

Congratulations! You've decided that an Enterprise Resource Planning (ERP) solution is the tool your company needs to take business to the next level. But what's next? While choosing the right solution for your business may be one of the toughest parts of the ERP process, it's critical that you have the right tools, team and implementation plan in place to get your system up and running as quickly and efficiently as possible.

An Implementation Plan Informs Team Members of the Following:

- › The goals of the project (which can include creating company-wide visibility and transparency, eliminating process bottlenecks and uncovering missed opportunities)
- › The overall implementation budget
- › The project time frame
- › The resources required to complete the project
- › The steps needed to meet the end goal
- › The potential risks and how to overcome them
- › The criteria for success

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The Acumatica ERP Implementation Process

The picture some statistics paint about ERP implementations can be alarming. According to a recent infographic by Technology Evaluation Centers (TEC), 50% of ERP implementations fail the first time around. TEC also says that ERP implementations take, on average, 30% longer than planned and cost three-to-four times what's budgeted.

But don't panic. Acumatica has more than 6,500 cloud ERP customers with much different implementation experiences. Take Acumatica's 2021 Customer of the Year Industrial Specialty Services (ISS), for example. With the help of Acumatica implementation partner NexTec Group, ISS implemented Acumatica in six months amidst both a global pandemic and three hurricanes.



Acumatica's 9 Step Process

How are companies like ISS able to implement Acumatica's cloud ERP so efficiently? With Acumatica's nine-step plan for implementation success:

- 1 Choose your deployment option
- 2 Assemble your team
- 3 Define your requirements
- 4 Develop a project plan
- 5 Migrate your data
- 6 System configuration
- 7 Develop a test plan
- 8 Train your staff
- 9 Go Live

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Step 1 Choose Your Deployment

Acumatica allows its customers to deploy its Cloud ERP solution via **Acumatica Software-as-a-Service (SaaS)** or **private Cloud**. Both options have their advantages and disadvantages. However, keep in mind that an advantage to you may be a disadvantage to someone else. Your specific business needs will determine which option is the best option for you.

Whichever deployment option you choose, Acumatica understands that fluctuating economic and marketplace conditions may require you to change your deployment option, and if they do, Acumatica allows deployment changes without penalty.



SaaS Deployment

- › Amazon Web Services (AWS) as the hosting service.
- › Acumatica maintaining and updating the computer hardware and operation system.
- › Automatic software updates.
- › Enterprise-level security, virus protection measures, backup/restore capabilities, and more provided by AWS.



Private Cloud Deployment

- › The need to purchase the hardware and software as an upfront cost and to store, maintain, and update the hardware by your IT department.
- › Complete control and access to the system.
- › Bear responsibility for network and security procedures.
- › Perform new release upgrades with assistance from Acumatica partners.

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Step 2 Assemble Your Team

In step two, you're ready to select a strong, dedicated implementation team. The team should consist of team members that hail from different departments, which ensures that differing opinions and varying capabilities are represented. With help from your Acumatica partner, you'll assign each person a specific role, and each role will require a certain amount of dedicated time based on their corresponding responsibilities.



Executive Sponsor

This is a critical role within the implementation team and should be held by someone who can lead the team, set expectations, determine resources and answer questions. He or she often comes from the executive team and can be relied upon to help fix any problems or challenges that arise along the way.



Subject Matter Experts

These individuals should be considered the authority on their field. Financial SMEs, for example, will be called upon to define user access roles and privileges as well as establish audit requirements. This person should have end-to-end insight into your company's financial requirements.



Project Lead

As the name suggests, the Project Lead will lead the team in the practical application of the plan, from coordinating resources and schedules to assessing progress, holding meetings and identifying problems. The Project Lead also acts as the go-between for the team, communicating how well the project is going to the Executive Sponsor and to the other team members.



Technical Lead

This person is responsible for all customization, report and integration documentation based on documentation standards and best practices, while also supporting data migration and security needs.

Step 3

Define Your Requirements

Once your implementation team is established, your next step is to define your requirements for your Acumatica ERP solution. This involves documenting current business processes, deciding which processes can be improved and making a dream list of functions for the new ERP system based on levels of importance, as noted below:

- › Essential
- › Desirable
- › Not an immediate need
- › Nice to have

Step 4

Develop a Project Plan

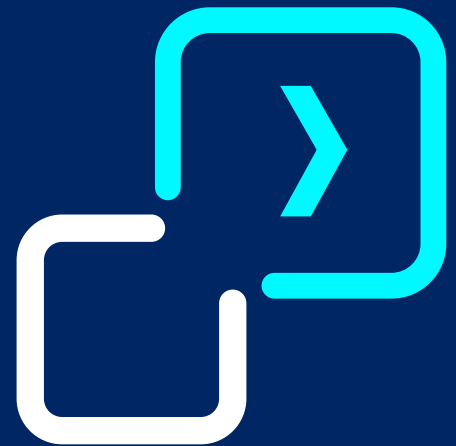
The project plan requires the assistance and know-how of your implementation team. Within this step, you and your team will be working with your Acumatica partner to plan the adoption process, design a system configuration and plan for the data migration. The plan will help keep the project on time and on budget.

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Step 5 Migrate Your Data

Step five involves meticulously moving your data from your existing system (or systems) into Acumatica's single, centralized database. It's not an easy or quick task, but Acumatica has a progressive checklist that simplifies the process:

- › Ensure all existing customer contact information is accurate and updated
- › Remove incorrect or redundant data (e.g. discontinued vendors or contacts no longer with the company)
- › Remove incorrect or out-of-date company data (e.g. old part numbers or discontinued products)
- › Set up your Acumatica database
- › Map your legacy ERP data to the new Acumatica database fields
- › Transfer the data to the new system
- › Test the new system to verify all legacy data has been moved and is accessible
- › Verify new data can be added to the system (e.g. new product information, inventory item location and new customer information)



Step 6 System Configuration

In this step, your consulting partner or Value Added Reseller (VAR) will work with you to take the requirements you defined in step 3 and transform your ERP solution into a business-specific system that is personalized for your company's unique needs. Because most ERPs come equipped with hundreds of features and modules, in this step, your VAR will "turn on" the usage controls and features you need, install specific modules, define workflows and customize processes for each of your departments or business function.

Step 7 Develop a Test Plan

As with any new process, it's best to be cautious and test the system before pushing it live. Each requirement you defined in Step 3 should undergo its own test to ensure each function meets its goal. Each test should have an objective, test data, expected results, a pass/fail determination and a place for team members to provide comments.



“Companies disagree about what the ‘right’ ERP software looks like, but there are some universal requirements for the ‘right’ ERP vendor. Your ERP vendor must have a reputation for delivering successful ERP implementations and for establishing the strong, collaborative relationships that are so necessary for overcoming challenges during the ERP implementation journey.”

– Todd Kuhns, VP of Services
Acumatica

Step 8

Train Your Staff

Acumatica implementation experts suggest dividing training into two components: one for SMEs and the other for software users.

The SME Training is for your IT and financial departments that administer the system, which includes superusers, system administrators and database administrators; these SMEs are responsible for teaching the User Training.

The User Training will be for all users to learn their respective roles and any new procedures introduced with the new system.

Step 9

Go Live

Finally, it's time to take your new system live. You'll first schedule the go live (many choose to do so over a weekend to create the least impact) and then you'll choose one of the two go-live approaches:



Big Bang

All at once, the old system is deactivated, and the new system is put into place.



Phased Approach

The new system is implemented in phases; phases can be categorized by module, geographical area or business unit.

Troubleshooting Implementation Issues and Avoiding Delays

In a perfect world, your ERP implementation process will be flawless. In reality, a perfect implementation isn't always attainable, which is why it's critical to understand why an implementation delay or problem may occur and how to counteract these issues when they arise.

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Major reasons for Implementation Delays

In a recent article addressing implementation delays, Acumatica's Senior Director of Professional Services highlights five major reasons delays occur:

1. Unrealistic expectations, which can be stoked by an unqualified ERP vendor
2. Misaligned leadership and team, often created by a lack of communication
3. Tentative decision making, which creates delays
4. An overwhelmed implementation team that is performing their everyday responsibilities as well as their implementation project ones
5. Misunderstanding of implementation ownership and a lack of responsibility on the part of the customer

Avoiding Implementation Delays

To avoid these problems, implementation teams need to employ a few commonsense measures that include:

Setting Expectations

Managing expectations and ensuring your ERP vendor is clear about implementation timelines and costs.

Build a Command Team

Creating a command team, that is able to make quick and decisive decisions.

Clear Communication

Communicating with your team members and the entire organization, to keep everyone on the same page by letting them know what's happening when.

Focus Teams

Reducing team members' workloads to allow them to focus on their implementation duties.

Sharing Responsibilities

Share the responsibility for implementation success amongst both you, the customer and your partner.

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Choosing NexTec as Your Acumatica Partner

NexTec is a gold-certified Acumatica implementation partner with more than 30 years of experience in the consulting industry.

We take a holistic approach in integrating the many moving parts of your business to remove the manual guesswork and improve your ROI.

As leaders in our industry, we bring a unique advantage to our clients that allows us to:

- Focus on giving you the best and most current software options
- Leverage our experience in ERP and the industries we serve
- Support your key business initiatives
- Drive tangible growth across your business





Connect with NexTec expert to explore how a modern ERP can improve your business.

Let's Talk

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nextec

NexTec Group is one of North America's largest and most experienced technology consulting firms, specializing in industry-specific solutions for mid-sized organizations. For thirty years, NexTec has been a trusted partner to businesses, delivering, implementing, and supporting the core Enterprise Resource Planning (ERP) and Business Intelligence (BI) solutions they need to scale and grow. With seasoned consultants from coast to coast, and a premium portfolio of innovative business management solutions including Acumatica and Sage X3, we help you get the most out of your technology investments.