

The background of the slide is a blurred photograph of a group of people in a meeting. They are seated around a table, looking at documents or devices. A warm, glowing light fixture is visible in the upper center. A large, semi-transparent blue rectangle is overlaid on the left side of the image, containing the title text. To the right of the text, there is a graphic element consisting of a white L-shaped line and a teal square.

# The Journey to a New ERP

A Best Practices Guide

# The Journey to a New ERP

Enterprise Resource Planning (ERP) implementation projects evoke a mix of excitement and apprehension. The promised benefits can profoundly impact your business. Leveraging over four decades of experience bringing ERP to thousands of businesses, Blytheco has curated this interactive guide to navigate you through the top 6 crucial planning stages, and subsequent phases, of a new software implementation.



Identify Needs



Engage the Experts



Define Vision & Requirements



Plan Budget & Resources



Implement Software & Prepare Your Data



Enhance & Optimize

## Bringing Our Expertise to Your Project

40+

Years of ERP Expertise and Best Practices

5,000+

Successful Software Implementations

75

NPS score consistently in the Excellent category (70+)

400+

ERP Industry Awards & Recognitions

400K

Client Hours Saved Through Automation and Technology

## 01 IDENTIFY NEEDS

In a rapidly evolving business landscape, the ability of your enterprise management software to adapt to changes in industry requirements, consumer demands, and competitive dynamics becomes imperative. Your next step is to determine if your current ERP software is meeting your needs.

Leverage the self-assessment checklist below to help identify if your business could benefit from a modern ERP.

- ☐ **Mobility:** Data is not easily accessible on-the-go or by remote team members.
- ☐ **Scalability:** The current solution cannot easily support additional growth, transactional volume, or users.
- ☐ **Accessibility:** Key information is siloed or data is not readily available to team members.
- ☐ **Connectivity:** Extensive third-party solutions, including some that don't integrate or sync with the ERP.
- ☐ **Accuracy:** Critical business processes require manual entry and are prone to human error.
- ☐ **Visibility:** Reporting and key metrics are compiled manually, lacking real-time, company-wide visibility and KPI insights.
- ☐ **Quality:** Manual management of compliance, reports, taxes, and documentation.
- ☐ **Performance:** The current solution slows down, lags, or crashes with additional tasks or users.
- ☐ **Security:** The ERP system is hosted locally on in-house servers, making it more vulnerable to threats and ransomware.
- ☐ **Efficiency:** The system lacks automation, tools, and functionality to work more efficiently.
- ☐ **Modernization:** The team relies on manual processes, batch processing, and/or time-consuming workarounds.
- ☐ **Upgradeability:** Software upgrades are expensive, time-consuming, and often require customization.

☒ **If you answered yes to 3 more of these questions, it's time to upgrade OR replace your existing software with a modern, holistic solution.**

## BENEFITS OF A MODERN CLOUD ERP



INCREASE IN  
PRODUCTIVITY\*  
**80%**



REDUCTION IN  
OPERATIONAL  
COSTS  
**23%**



REDUCTION IN ADMIN TIME\*

\*Based on average percentages.

Source: G2 ERP Statistics

## 02 ENGAGE THE EXPERTS

Dedicating time to assess ERP system choices and performing due diligence is crucial. Engaging Blytheco experts offers key benefits in the software selection and planning process.

- **Software Expertise** Our team explores ERP software options that align with your specific needs, documenting your challenges, processes, and requirements for a tailored solution.
- **ERP Evaluation** Our experts guide you through evaluating software offerings and identifying the most optimal solution by leveraging our knowledge of the ecosystem.
- **Expert Recommendations** Drawing on our extensive experience, we provide recommendations to address challenges and foster business growth, ensuring the chosen solution aligns with your strategic objectives.
- **Relevant Demonstrations** We offer in-depth, proof-of-concept demos tailored to your unique needs, enabling you to experience the system's capabilities firsthand.
- **Detailed Estimates & Scope** Prioritizing accuracy, we scope your project upfront, providing transparency on timing, resource allocation, and cost considerations.
- **Guided Process** Seasoned business solutions managers, expert consultants, and diligent project managers will carefully guide you through each step of your ERP journey.





## 03 DEFINE VISION AND REQUIREMENTS

A vision statement reflects a company’s long-term goals, values, and aspirations related to the project. It serves as a guiding light for the project team and stakeholders, ensuring alignment and focus throughout the implementation process.

### Unified Efficiency Vision

To seamlessly integrate all facets of our operations into a single, unified platform, driving efficiency, transparency, and growth. This ERP implementation will empower our teams with real-time data and insights, enhancing decision-making, optimizing resources, and delivering projects on time and budget.

### Digital Transformation Vision

Through this ERP implementation, we envision a digitally transformed company where silos are eradicated, processes are streamlined, and every stakeholder, from the site engineer to the CEO, has the information they need at their fingertips.

### Building the Future Vision

Our ERP implementation is not just about adopting a software solution, but about paving the way for a smarter, agile, and more sustainable business model. This is our commitment to building the future – where projects are executed with precision, risks are minimized, and every employee is empowered with knowledge and tools.

## FORMULATE A PROJECT VISION

A clear and shared vision with consensus among stakeholders is imperative to successful project inception. To aid in envisioning, dedicate time to address the following questions individually and collectively as a team.

**Step 1:** Craft a project vision statement (your “big why”).

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**Step 2:** Identify the key business outcomes you aim to achieve by implementing a modern ERP solution.

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## DEFINE REQUIREMENTS

A requirements gathering process is iterative. Needs might evolve as the organization gets a clearer picture of what's available in the market and as internal priorities shift. Continuous communication and flexibility are key to ensuring that the final ERP system aligns well with organizational objectives. Our guided process is proven to elicit requirements in the most effective way.



### 1. Initial Workshops

- Understand the broad objectives and expectations.
- Document pain points with current processes and systems.



### 2. Define Business Processes

- Map out existing business processes.
- Identify inefficiencies or redundancies in current workflows.



### 3. Document and Prioritize Functional Requirements

- List specific functionalities needed in the ERP system.
- Categorize them as 'must-have,' 'nice-to-have,' or 'future consideration.'



### 4. Technical Requirements

- Identify infrastructure needs, integrations with other systems, data migration considerations, and any specific technology standards.
- Consider scalability, security, and disaster recovery requirements.



### 5. User Experience and Interface

- Understand what users expect in terms of user-friendliness, accessibility, and layout.
- Gather input on reporting needs and dashboard preferences.



### 6. Review and Sign Off

- Have key stakeholders and the project team review and sign off on the finalized requirements.

#### ERP FACTS & STATS

60%

Projects succeed 60% more often when key team members align with defined goals.

*Is your entire team aligned on the 'big picture'?*



Source: LinkedIn



## PLANNING YOUR BUDGET

A common question when embarking on an ERP journey is, “How much will this cost?” To provide insight, we compiled average investment figures based on industry standards.

	One-time Services	Software Subscription	Average Project Time
Financials	\$35-65k+	\$15-40k+	3-6 Months
Distribution	\$65-95k+	\$20-50K+	6-9 Months
Manufacturing	\$80-180k+	\$30-65k+	6-12 Months
Construction	\$75-160k+	\$20-50k+	6-9 Months

**One-Time Services** represents the typical investment to implement new software. This includes design, configuration, data, training and go-live support.

**Software Subscription** represents a range of annual recurring software subscription costs.

**Average Project Time** outlines an average number of months to implement a new solution.

## BEST PRACTICES FOR ESTABLISHING AN ERP BUDGET

A new ERP system can bring significant ROI. When planning and setting a budget, several crucial factors require careful consideration. We recommend following these best practices:

### 1. Comprehensive TCO Assessment

Compile and document a comprehensive “total cost of ownership” (TCO) assessment for your current software platform, including supporting solutions, add-ons, hosting or server expenses, IT costs, annual upgrades, and support. This establishes a baseline for your new project.

### 2. Payment Options

Explore different payment options, such as upfront annual payments or custom financing.

### 3. Budget Preparation

Prepare and document your technology budget in collaboration with key stakeholders and IT. Align on the available budget for software, both upfront and recurring annually. This aids in determining the suitability of solutions, phasing, and preparedness.

### 4. Contingency Budget Allocation

Allocate a contingency budget of 10-15% to account for unexpected expenses, such as additional training, unforeseen business circumstances, or additional requirements that may arise and potentially delay the project.

### 5. Future Planning

Consider potential needs, such as support costs, new employee training, future automation, renewal increases, and business expansion. Recognize this as a long-term investment for your business to set realistic expectations and ensure ongoing success.

# PLANNING YOUR RESOURCES

For a successful ERP project, securing the appropriate resources is paramount. It’s vital to clearly delineate roles, responsibilities, attributes, and stakeholders during the implementation phase. The project’s success hinges on having a dedicated team with both the capacity and passion to advocate for the new ERP system.

Project Roles	Responsibilities	Ideal Attributes	Blytheco Counterpart
<b>Executive Sponsor</b> 1-2 hours / week	<ul style="list-style-type: none"><li>• Establish project vision</li><li>• Identify resources</li><li>• Uphold accountability</li><li>• Support decisions</li></ul>	<ul style="list-style-type: none"><li>• Position of authority</li><li>• Decisive</li><li>• Motivates change</li><li>• Drives accountability</li></ul>	<b>Blytheco Executive Sponsor</b>
<b>Project Manager</b> 2-6+ hours / week	<ul style="list-style-type: none"><li>• Drive team progress</li><li>• Monitor task completion</li><li>• Review budget regularly</li><li>• Escalate issues</li></ul>	<ul style="list-style-type: none"><li>• Collaborative</li><li>• Inspirational</li><li>• Highly organized</li><li>• Project management skills</li></ul>	<b>Blytheco Project Manager</b>
<b>Subject Matter Experts</b> 2-8+ hours / week	<ul style="list-style-type: none"><li>• Participate in design and training</li><li>• Complete assigned tasks</li></ul>	<ul style="list-style-type: none"><li>• Adaptable to change</li><li>• Strong process knowledge</li><li>• Focus on optimization</li></ul>	<b>Blytheco Consultants</b>

## Timeline Considerations

Busy Seasons	Impact of Major Hiring Decisions	Holidays and Blackout Dates	Resource Constraints	Competing Company Priorities
Take into account the busy periods for your team and plan the project during slower times.	If hiring for key roles, such as a CFO, be mindful of their impact on the ERP project plan and processes.	Consider and plan around holidays and blackout dates that may affect the availability of resources.	Set realistic timelines that align with your team’s capacity and availability to prevent resource strain.	Ensure the ERP project receives the necessary focus and avoid planning it during other major company initiatives or decisions.

### PROJECT TIP

#### Assign “Project Champions”

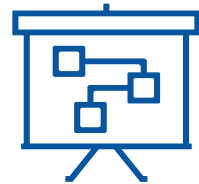
Designate individuals that have good communication skills, can motivate and inspire others, and are not afraid to communicate challenges with leadership. Internal project champions help keep your project on track.





## 05 IMPLEMENT SOFTWARE

Once an ERP system has been selected, the implementation phase begins. At Blytheco, we've developed a proven step-by-step project methodology to drive success.



1

Pre-Planning

- Communication plan
- Team assignments
- Data scrubbing
- Data preparation
- Assess artifacts



2

Kickoff

- Formal kickoff call
- Team introductions
- Project plan set-up
- Resource assignment
- Establish key roles
- Establish weekly team calls



3

Implementation

- System set-up
- Process configuration
- Data migration
- Workflow set-up
- Integrations
- Add-on set-up
- Product training



4

Validation

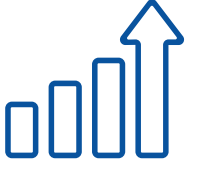
- End-to-end validation
- System testing
- Connection testing
- Customization testing
- Issue resolution
- Go-live schedule



5

Go-Live

- Final team preparation
- New ERP transition including cut-over data
- Real-time support



6

Optimization

- Process optimization
- System enhancements
- Automation
- Future phases

### Blytheco recommends the following best practices for a successful ERP implementation:

- ☐ Prioritize the project as a strategic company initiative.
- ☐ Share and align on the project vision with stakeholders.
- ☐ Document needs, challenges, processes, and opportunities.
- ☐ Gain department buy-in and create a clear resource plan.
- ☐ Formalize a data optimization plan for smooth migration.
- ☐ Develop a clear and realistic project plan.
- ☐ Implement a change management strategy.
- ☐ Hold weekly team meetings to provide ERP updates.

ERP projects that take a step-by-step approach to implementation are

**83%**

more successful on average.

Source: G2 ERP Statistics

*Your Blytheco trusted advisors are here for the entire journey.*

## PREPARE YOUR DATA

We recommend appointing a team of experts to prepare data. Below are best practices on reviewing your data and which data is needed for a successful transition.

### ASSESS ARTIFACTS

Take the time to evaluate any artifacts or resources you wish to bring into the new software, such as vendor agreements, item images, or documents. Audit, log, and quantify the volume of artifacts you have, and designate a point person responsible for attaching these resources in the new system.

### SCRUB YOUR DATA

Data quality plays a significant role in project success. Before transferring any data to the new system, ensure it is accurate and current. Review your current data by removing old or irrelevant information, filling in missing or outdated contacts, and entering important data where it's blank.

The following data **is not** typically migrated to your new ERP:

- AR invoice history
- AP invoice history
- Payment history
- PO and receipts history
- Historical manufacturing entries
- CRM historical transactions

## MIGRATION PRACTICES: THIS TYPE OF DATA IS REQUIRED IN THE NEW ERP

### Master Data

- ☐ Chart of accounts
- ☐ Active customers
- ☐ Active leads (CRM)
- ☐ Active vendors
- ☐ Active items/products

### Transactional data

- ☐ Trial balance monthly changes (2 fiscal years plus year-to-date)
- ☐ Open AR invoices
- ☐ Open AP invoices
- ☐ Open payments and deposits
- ☐ Open opportunities (CRM)
- ☐ Open quotes and sales orders
- ☐ Inventory counts
- ☐ Open POs and receipts
- ☐ Open work orders (manufacturing)



## 06 ONGOING OPTIMIZATION

### CELEBRATE WINS

Promote a culture of celebration and teamwork throughout your ERP implementation journey. While software implementations may not be inherently exciting, make it a point to incentivize your team and introduce gamification elements. Foster healthy competition between departments and track progress towards goals. Importantly, remember to celebrate project milestones and achievements with the entire team.



### PREPARE FOR LIFE AFTER IMPLEMENTATION

Life after an ERP implementation marks a new chapter for your company. Your organization has the opportunity to increase efficiencies, refine processes, and measure your success.

### RECOMMENDATIONS AFTER GO-LIVE

1. Continue learning via webinars and events.
2. Certify your SMEs in their respective areas.
3. Establish a roadmap for go-forward optimizations.
4. Refine existing processes and workflows.
5. Connect regularly with your Account Manager.
6. Seek out efficient functionality extensions.
7. Work with us for support, upgrades, and updates.
8. Identify opportunities for automation and AI.

**When sharing positive outcomes of successful ERP projects with your team, use client metrics and tangible examples to provide real-life inspiration on what is achievable with modern software solutions.**

**Live on-time and under budget**



**Operating more effectively and efficiently**



**40%+ Increase in Data Entry Efficiency**



**Increased Sales by 22%**



[View More Client Testimonials](#)

### Measuring Your Success

To gauge the success of your ERP project, it is crucial to define what success means for your business. Success metrics can vary widely depending on your unique objectives and challenges. It is recommended to document your current state of affairs as a baseline for comparison 6-12 months down the line. Effective methods to gather these metrics are to conduct interviews with department leaders and review historical data.

Having metrics at the outset of an ERP project enables you to accurately measure ROI throughout and after implementation. These metrics serve as key performance indicators (KPIs) for tracking continuous improvement and justifying your investment to stakeholders.

**Examples of metrics worth capturing at the project's outset include:**

- ☐ Current month-end close times
- ☐ Current order processing times
- ☐ Sales close times: lead-to-cash
- ☐ Manufacturing or production times
- ☐ Order fulfillment times: pick-pack-ship
- ☐ Customer service times: SLA





For assistance with planning and executing your successful  
ERP or CRM implementation, contact us:  
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