



Tailored For Agencies

GUIDE TO ERP
IMPLEMENTATION
FOR AGENCIES

TABLE OF CONTENTS

S.NO 01	Introduction - ERP is one of the most crucial solutions that has grown in relevance to become the lifeline of how most organizations function.	01 Page
S.NO 02	Steps to ERP implementation - For every organization, there comes a time when it outgrows the capacities of its homegrown systems. Implementation of ERP becomes essential for the functioning of such companies.	02 Page
S.NO 03	7 Questions agencies should ask an ERP provider - The first step should always be to know your ERP vendor. How long have they been in the business, what kind of ERP solutions they have deployed over the course of time	06 Page
S.NO 04	Does your ERP give Intelligence - There is a common misconception that standard ERP provides intuitive insights and analytics for your data. The truth, however, is far from that	10 Page
S.NO 05	Summary - In the rapidly changing corporate world, companies have always been striving to be at the fore of innovation. The runners upfront need to edge ahead of the competition by deploying a multitude of solutions that streamline their work process and utilize their data to get the best out of it.	11 Page

The background features a complex, abstract geometric pattern composed of numerous overlapping triangles. The color palette is primarily red and orange, with some triangles appearing in lighter, more translucent shades. The triangles vary in size and orientation, creating a dynamic and layered visual effect. The overall composition is asymmetrical, with a higher density of shapes on the left side of the page.

INTRODUCTION

Introduction

ERP systems are the lifeline of organizations. All agencies, either big or small, can benefit from an ERP system (Especially Cloud ERP Platforms) by eliminating the need of having separate databases, and manual data entry that is often redundant and error-prone.

However, implementation of such a platform often comes across as a cumbersome task for most companies. It could be due to not keeping up with the constantly evolving technologies, or because of lack of awareness about the best practices that should be undertaken while deploying the ERP.

We have brought together a collection of ideas and practices to help, assist and guide you through what is the most transformative step for your agency.



SECTION I-
STEPS TO
IMPLEMENTATION

Section I – Steps to Implementation

For every agency, there comes a time when it outgrows the capacities of its home-cooked systems. Implementation of ERP becomes essential for the functioning of such companies. However, the Implementation is a crucial task and comes with its own set of challenges, possible setbacks and a significant investment.

We have compiled a comprehensive schema of the steps a company should take, the challenges that might emerge and the best ways to handle them during this journey:



Know Your ERP Requirements (Cloud-First is the only way to go) & Objectives –

The first challenge is to determine whether your agency needs an all-out Suite implementation or you want to deploy with only a few operational areas and then scale it further as required.

A consultant can assess the immediate needs of your agency and devise a plan indicating the areas which can be made more efficient with the help of the enterprise-wide system and the areas which are not in immediate need.

Knowing the objectives and requirements of an implementation for your agency can help you in deciding the best course of action while choosing a platform, and bringing in significant savings of cost, time and effort.

If you believe that you have a concrete idea of the business needs, & this is something that the Cloud ERP solution should address. [Get a free ERP assessment report here.](#)



Choosing the Right Vendor –

Choosing the right vendor may often be a precarious. Always put forth your queries to your prospective vendor, and assess their answers to determine whether they're offering what you need.

It helps to know the prior experience and service history of your vendor to see if their ERP solution is suitable for configuring and supporting your system. It is crucial to know the cost and guarantee of their solution, along with the effectiveness of their training and support teams.

Choosing the vendor is the part where most make-or-break deals happen, and getting the right vendor can help you sail smoothly with the rest of the implementation.



Assess the Platform –

Learn more about the solution that you have chosen to deploy. A peek into the history of the company can show you how their solutions were created and developed over the course of years. Knowing whether their product originally started as inventory control or a service knowledge base or any other specific solution, and then tracing its follow-up to the current state can provide insights into the potential strengths and weaknesses of the product. This will help you determine how best to use the platform post-deployment.

Also, estimate your future business needs regarding the platform and the possible upgrades you will be executing. Choose an ERP, that is easy to upgrade (rather a solution that applies upgrades with minimal disruption & customization breakages) and easy to adapt to.



Assign a Dedicated Team –

Once you have decided whether you are opting for a full-scale deployment or a phased approach, the ideal way to go forward is to have a dedicated team assigned for it.

Usually the entire process may take a long time depending on the scale of the deployment, and can cause significant disruptions. A dedicated team with a skilled leader can oversee the implementation, keep the process on track and facilitate communication between the company and vendor to ensure the success of the implementation.



Get an Estimate of the Timeframe and Disruptions –

A vendor should be able to provide you with an approximate estimate of the timeframe which is needed to get your system up and running. Additionally, you should ensure that the vendor provides a reasonable cost estimate and the possible disruption scenarios the implementation is likely to cause.

Having the information in hand will further assist you in keeping a tab on the scope creeps and cost-effort overruns, if any.



Customization, Scalability, Integration, Data Transfer-

As the implementation is undertaken, several challenges emerge which can be swiftly tackled with foresight.

For example, the implementation may not always eliminate the bottlenecks and the inefficiency of the old system. It can happen due to poor integration of the solution with the existing systems, or some of the obsolete software and working processes still being a part of the whole process.

Ensure that old and obsolete systems are disposed of, so that a seamless integration can take place.

Often the customization of the platform with existing processes can go overboard, especially if the intent is to design a system that is ubiquitous and quasi all-purpose. Over-customization often causes complexity, so the solution here is to customize only when it creates a real advantage.



Training -

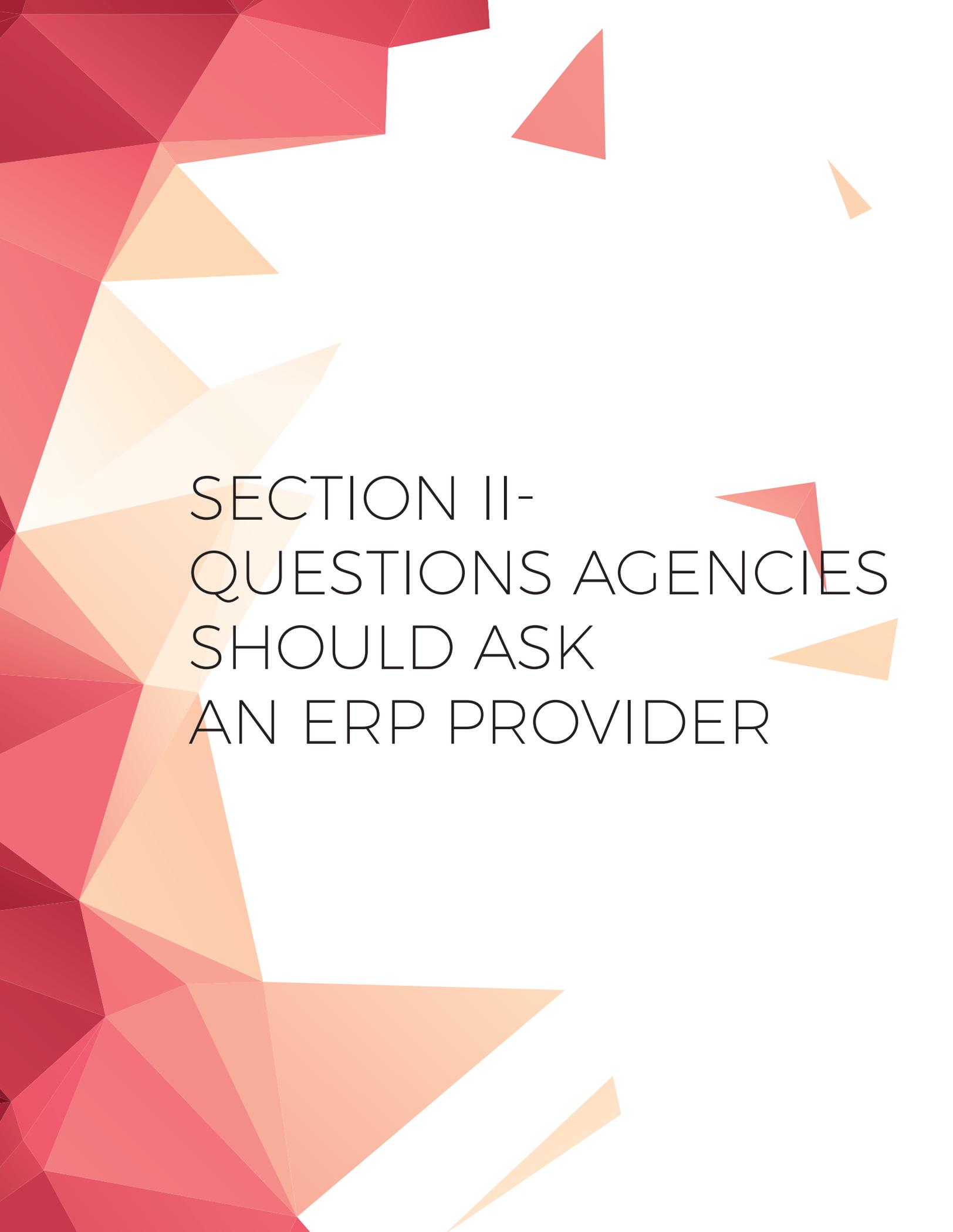
Even after the Platform is implemented, a lack of user-adoption can cause problems. Ensure that your vendor has a team of skilled consultants and trainers who can devise a training plan and decide whether the users will be trained beforehand or along with the implementation process.

A rigorous follow-up of the steps specified above, foresight into the possible challenges and a clear communication between your agency and your vendor will make the implementation of ERP an easy task and an experience that both the sides can benefit from.

The most crucial step which can significantly decide the success or failure of your implementation, is choosing the vendor that is right for you. In their search for vendors, many agencies are lead astray by flashy advertising or cannot find the solution they were looking for. Or when they do find the right solution, they cannot fully utilize its potential.

You should find a vendor that understands and fulfills your requirements, offers compatibility with your work ethos, and the most important of all – is willing to answer all your queries.

Here is a list of essential questions that you should ask the Platform vendor to ensure that they are the chosen ones for your agency:



SECTION II-
QUESTIONS AGENCIES
SHOULD ASK
AN ERP PROVIDER

Section II - 7 Questions agencies should ask an ERP provider

What is the history of your company and your ERP software

The first step should always be to know your ERP vendor. How long have they been in the business, what kind of ERP solutions they have deployed over the course of time, what are their strong suits and what is their track record?

But that doesn't mean that you shouldn't consider new vendors at all. There are certain parameters based on which you can judge newcomers and decide whether they will be the right choice for you.

2. What is the cost of your ERP solution?

Since pricing structure varies among different vendors, it is always wise to ask upfront for the cost of ERP deployment. Most vendors provide Software on two bases: license-based and subscription-based; and you can choose between the two after considering your needs.

3. How much time would it take for my system to go live?

An ERP vendor should be able to furnish a proper project plan along with a specific timeframe according to which your solution will be deployed. Transitioning from your old system to a new ERP can cause occasional disruptions, and it helps to have a reasonable estimate of when your system will be back to running smoothly. Keeping a tab on the timely progress of the deployment can help you in keeping a check on the cost over-runs.

4. What is your uptime guarantee?

No system or solution can ever be absolutely foolproof. There will always be non-zero chances of things going wrong and when that happens, your vendor should be accepting accountability for it. A certain guarantee time-period should be specified in the Service Level Agreement that you sign, along with specified steps that a vendor is obligated to take to comply with the promised terms and conditions.

5. How often will you upgrade your software and how much would it cost?

After a significant amount of cost investment spent in purchasing an ERP solution, often it comes out as a daunting task to pay for continuous upgrades. New upgrades in a software show the commitment of

vendor towards providing a better and constantly improved service.

You should enquire about the frequency and extensiveness of their upgrades along with the cost involved, so that you can be able to decide when to upgrade your system in the future and what would be the additional budget requirement for it.



6. What kind of training is needed and how will you provide it?

As the new system is deployed, it becomes imperative to ensure that your employees know how to use it and how to get the best out of the data insights the new system provides. A seasoned vendor should have skilled personnel with a comprehensive training plan to help your users know their system as the implementation takes place.



7. Do you have a support system? How does it work?

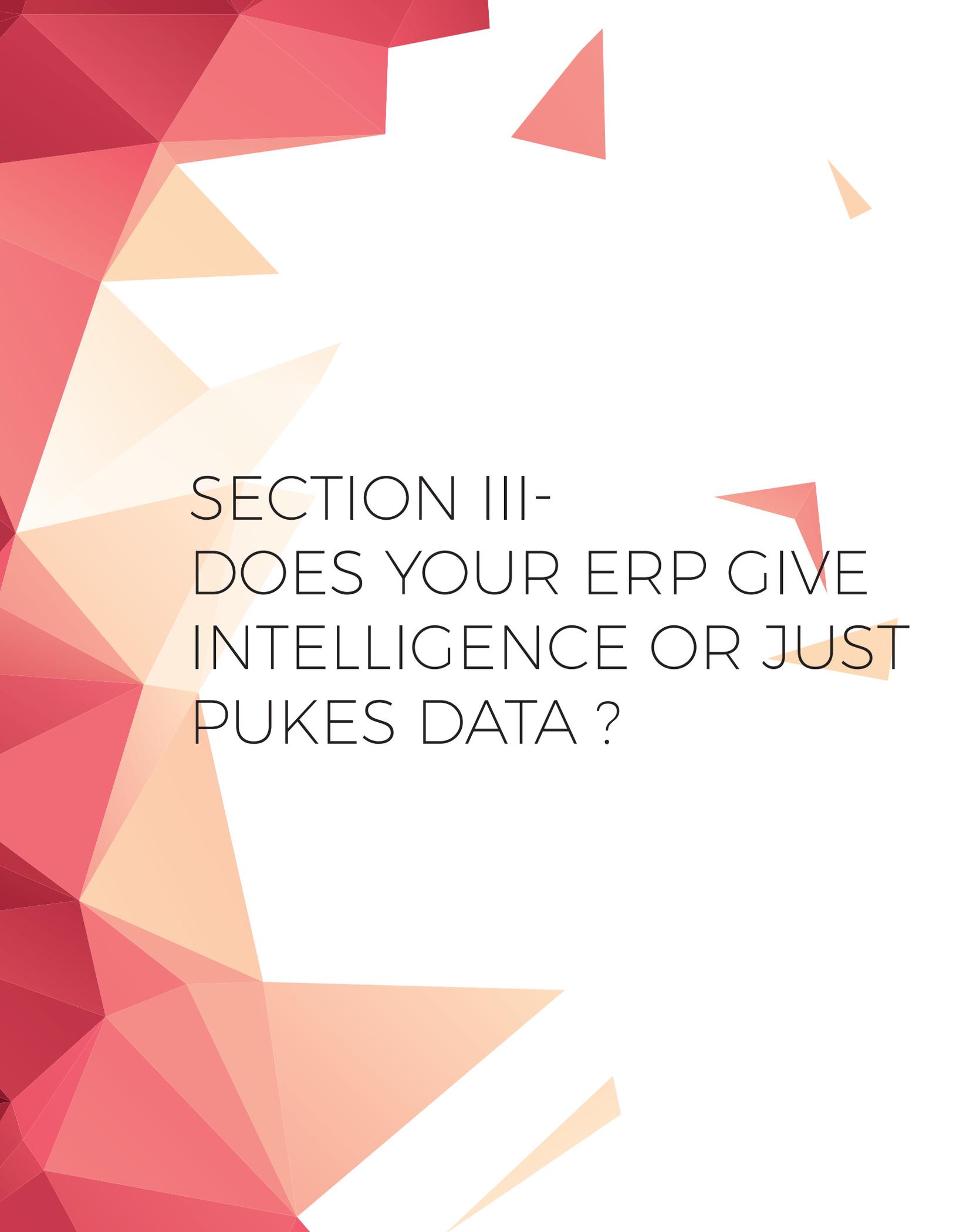
Your users will certainly have a lot of queries once they start working with a new system, and it becomes essential to know whether your vendor has a team of dedicated support team who are available whenever needed.

These are only a handful of the questions whose answers you'd be needing from your vendor. Remember, ERP deployment is a cost-significant investment and no number of questions you ask can be too many.

Keep yourself informed, always have a set of quantifiable information regarding the cost, effort and time invested during the whole process, and the whole transitional process from your old system to a powerful one will be a breeze.

Considering that the primary work of ERP is to take data from various business activities and enable the flow of real-time information, the system can be equated to a nervous system for your agency.

With the advent of machine learning and advanced it becomes imperative to know what an Intelligent ERP or iERP is, and the changes it will bring in near future.

The background features a complex, abstract geometric pattern composed of numerous overlapping triangles in various shades of red, pink, and orange. The triangles vary in size and orientation, creating a dynamic and layered visual effect. The colors transition from deep reds on the left to lighter pinks and oranges towards the right.

SECTION III-
DOES YOUR ERP GIVE
INTELLIGENCE OR JUST
PUKES DATA ?

Section III – Does your ERP give Intelligence or just pukes data?

There is a common misconception that standard ERP provides intuitive insights and analytics for your data. The truth, however, is far from that.

So with a good system you get at your disposal an abundance of data, integration of business processes and automation of operations. Now comes the question of analyzing and processing the data, and converting it into actionable information. Is your ERP intelligent enough to come up with insights or is it just a system that pukes data?

This brings us to the next step in ERP technology – the Intelligent ERP or iERP. The main advantage of iERP over a standard ERP is that it can perform a multifaceted analysis of your big data, and provide deeper insights across business applications and processes to give an edge that keeps companies a step ahead of the competition.

However impressive the prospect of an intelligent ERP seems, its effectiveness varies according to the needs of a specific organization. For some organizations it may bring a significant change in the ways they do business, and for some organizations it may not do much more than what a standard ERP would. It depends not only on the analytical needs of the company, but also on the company's methods of doing its business and the prevalence of a data-oriented culture within the company.

Before initiating the implementation of an Intelligent ERP, it is imperative to check how much your agency can benefit from it. Would the deployment of an iERP really give your agency the much needed edge over your standard ERP? Is there a data-oriented work culture that can accommodate the iERP and facilitate a smooth transition?

At times, a standard ERP can be more than enough to serve the analytical needs of your agency. Nevertheless it is always recommended to evaluate how much intelligence it provides before the data output becomes a sputtering volume that might need an iERP.



SUMMARY

Summary

After a proper implementation of ERP, it can change entirely the way most processes in your company function, the way data is shared and interpreted; it can bring in greater visibility, insightful analytics and enhanced efficiency. Since ERP implementation is a process that involves significant spending of capital and resources, and offers an immense potential which can be utilized to generate benefits as soon as the system goes live; it is imperative to see the process being executed smoothly from beginning to the end.

With the deployment of an ERP solution that suits your needs, you can ensure a complete metamorphosis of your business practices. A good preparation, and being cognizant of each step in the process can work wonders – and the implementation of ERP would be a smooth process.