Planning for a Technological Transformation

Hamza Zia

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Webinar Features and CPE Credit

Q&A   Asking Questions

CC   Closed Captioning

?   Help

CPE   CPE Credit

CPE Status

Criteria for Full Credit

○ Minutes to Watch: 50

○ Number of completed Poll(s) required: 3
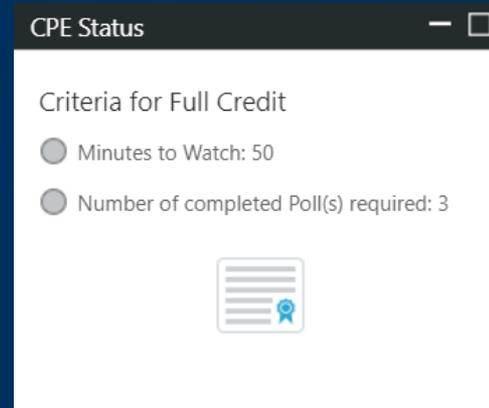
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Hamza Zia's Biography

Hamza Zia is the Director of Solution Architecture at Myers-Holum responsible for overseeing the Solution Architecture team and ensuring IT strategy is aligned with clients' current and future business goals. Hamza and his team design optimal technical solutions in support of clients' enterprise goals. Leading the team of senior technology experts, he focuses on providing a layered, specialized approach to NetSuite implementations providing consistent, highly successful results for clients using a stairway approach.

A business value-focused technology expert, Hamza has over 10 years of techno-functional NetSuite implementation and architecture experience with an emphasis on multi-phased project planning. This includes complex integrations and data migration.

Learning Objectives

1. Identify the steps needed to plan and execute for change.

2. Describe how to plan for every stage of an ERP implementation.

3. Recognize where and how to apply change management.

4. Discover ways to enable your team and load balance a successful ERP implementation.

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Agenda

1. Intro to Myers Holum

2. Why is this Topic Important?

3. Anticipate and Adjust for Risk

4. What is Change Management?

5. How to Identify and Apply Change Management

6. Conclusion and Key Takeaways

Myers-Holum Inc. (MHI): Who We Are

Founded in 1981

Founded in 1981 by Mark Myers, President/CEO, & Knute Holum, EVP, with HQ in NYC and resources across North America and the world.

350+ Consultants

With over 350 consultants and developers, Myers-Holum has delivery centers in the U.S. and Canada with a robust international presence as well.

Industry Expertise

Advertising, Energy, Finance, Food & Beverage, Health & Beauty, Insurance, Logistics Manufacturing, Retail, Software & Technology, Telecom, Wholesale Distribution

NetSuite Partner

Award-winning leader in NetSuite for the past decade, Myers-Holum helps enterprises streamline operations, financials and business processes.

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Full-Service Firm

Myers-Holum provides end-to-end technology solutions including ERP implementations, integrations and customizations with a NS-certified team of whom many are also CPAs.

MYERS-HOLUM DELIVERY CENTERS

We have delivery centers across the United States, as well as in Canada, Mexico, Chile, Uruguay, the Philippines, India, Pakistan and Australia, and our expansion into new markets continues to grow. We support Global Implementations.

✓ New York, NY (HQ)
✓ Boston, MA
✓ Washington D.C.
✓ Charlotte, NC
✓ Charleston, SC
✓ Atlanta, GA
✓ Miami, FL
✓ Nashville, TN
✓ Toronto, ON

✓ Chicago, IL
✓ Austin, TX
✓ Dallas, TX
✓ Denver, CO
✓ Salt Lake City, UT
✓ Los Angeles, CA
✓ San Francisco, CA
✓ Seattle, WA
✓ Montreal, QC

Myers-Holum

Myers-Holum Inc. (MHI): What We Do

MHI delivers exceptional results in NetSuite deployments, integrations, optimization initiatives, data migration and BI projects as well as managed services.

ERP IMPLEMENTATION

Initiate → Analyze → Build → Validate → Convert → Optimize

DATA MIGRATION & BI PROJECTS

- Current State Assessment
- Future State Definition & Implementation Planning
- Implementation & Deployment

MANAGED SERVICES

- Dedicated Managed Services Team
- Industry-specific Expertise & NetSuite Certified Staff
- End-to-End NetSuite Support
- Consulting & Outsourced Administration
- Pay-for-what-you-use billing based on T&M

Myers-Holum

Why is this Topic Important?

ERP is Fundamental to all Organizations

- Almost everyone who's viewing this presentation has either been a part of — or will be going through — an ERP implementation during their professional careers.

- ERP implementations help modernize organizations and allow for individuals leading them to drive major changes for operational, financial, and personnel efficiency.

- One of the largest barriers to a successful ERP implementation is appropriate change management which leads to a lack of adequate user adoption. Identifying and solving for this risk can help save your organization millions of dollars.

ERP Market Share is more than doubling each year…

…The global ERP market size has been valued at $39 billion and is projected to grow to $86 billion by 2027.

- Allied Market Research

However...

…Approximately 55-75% of ERP implementations fail to meet their objectives.

-    Gartner Research

Factors that Drive Successful vs Failed Implementations

Some of the main reasons why ERP implementation fail is based on stage:

- ❑ **Pre-Implementation Planning**
  - ➢ Client Resource Planning & Time Commitment
  - ➢ Implementation Vendor Knowledge

- ❑ **Mid-Implementation**
  - ➢ 80/20 Rule
  - ➢ Inadequate Testing
  - ➢ Change Management & Training
  - ➢ Implementation Fatigue

- ❑ **Post-Implementation**
  - ➢ User Adoption
  - ➢ Over Reliance on Consultants
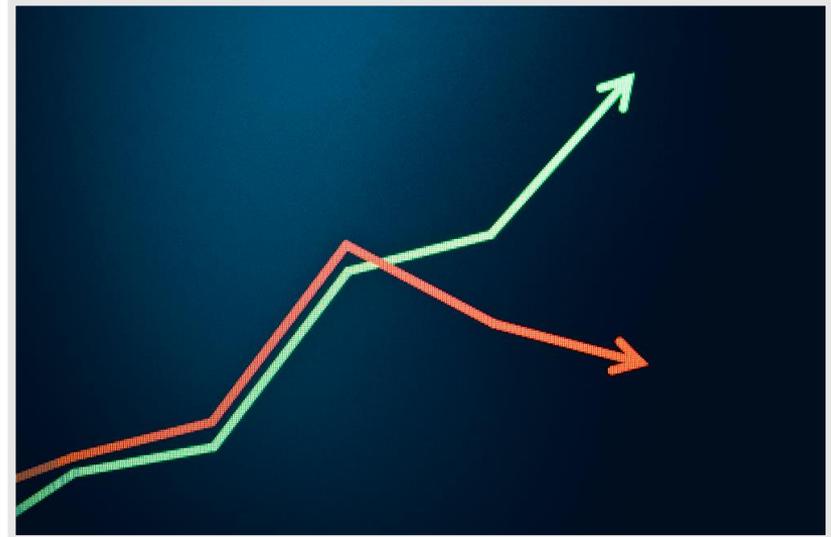
Poll Question 1:

Have you been part of any ERP or other major technology implementation in your professional career?

a. Yes
b. No

Poll Question 1 Results: (Placeholder)

Anticipate and Adjust for Risk

Common Project Risks & Countermeasures

Project Risks

- Executive Commitment
- Resource Availability
- Requirements Definition
- Quality and Timely Decisions
- Communication Gaps
- Scope Creep
- Technical Debt
- Concurrent Projects
- Data Readiness
- Integrity in Quality Assurance
- Integrity in User Acceptance Testing
- Integrity in End User Training
- Change Management
- Business Seasonality
- External Audits
- External Risks

Countermeasures

- Change Management Communications
- Monthly Steering Committee
- Weekly Project Team Status
- Daily Project Team/Sub-Team Stand-ups
- Data Governance Program
- Proactive Scheduling and Availability Planning
- Assess Feasibility with POC During Design
- Wet Signatures for Design Sign-Off
- Seek User Feedback Early and Often
- Require Process Owner Involvement
- Established Departmental Super Users
- Align on 'Definition of Done'
- End User Training Verification/Certification
- Wet Signatures for Testing Sign-Off
- Project Issue Escalation Protocol
- Proactive Risk Communication

Define Project Teams and Structure

Legend
- Client Project Team
- Client Extended Team
- Myers-Holum Consulting
- Third Party Consulting

Steering Committee

Project Sponsor

Project Sponsors

Program Manager

Delivery Manager

Systems Architect/Administrator

Functional Consulting Team

Technical Consulting Team

Avalara

Recurly

Boomi - Shopify, Amazon FBA, 3PL's

Message Media

Client Business Participants

| Finance & Accounting	Product Lifecycle	Product Information	Supply Chain	Procurement & Suppliers	B2B Sales, Marketing, & Support	B2C Sales, Marketing, & Support
Project Lead	Project Lead	Project Lead	Project Lead	Project Lead	Project Lead	Project Lead
Process Owner(s)	Process Owner(s)	Process Owner(s)	Process Owner(s)	Process Owner(s)	Process Owner(s)	Process Owner(s)
Super User(s)	Super User(s)	Super User(s)	Super User(s)	Super User(s)	Super User(s)	Super User(s)

Poll Question 2:

If you have experienced an ERP implementation, was the implementation considered a success for your organization?

a. Success
b. Partial success
c. Partial failure
d. Failure
e. Not yet experienced an ERP implementation

Poll Question 2 Results: (Placeholder)

How to Identify When to Apply Change Management
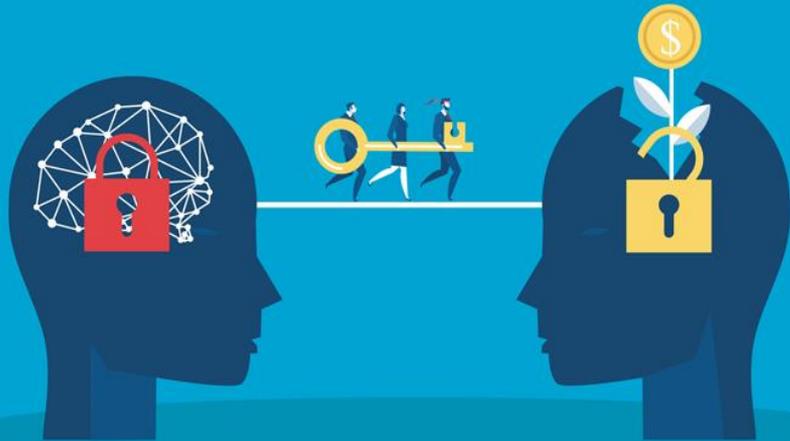
What is Change Management?

❑ **Practical approach** to enable, manage the people side of change

❑ **Activities and deliverables driven by the ERP Cloud Project** and interrelated with the Project Management discipline/plan

❑ **Collaborating with the Project Team, HR and People Managers** to define key process and job roles, changes/impact

❑ **Preparing, equipping and driving adoption** through communications, management sponsorship, coaching and training
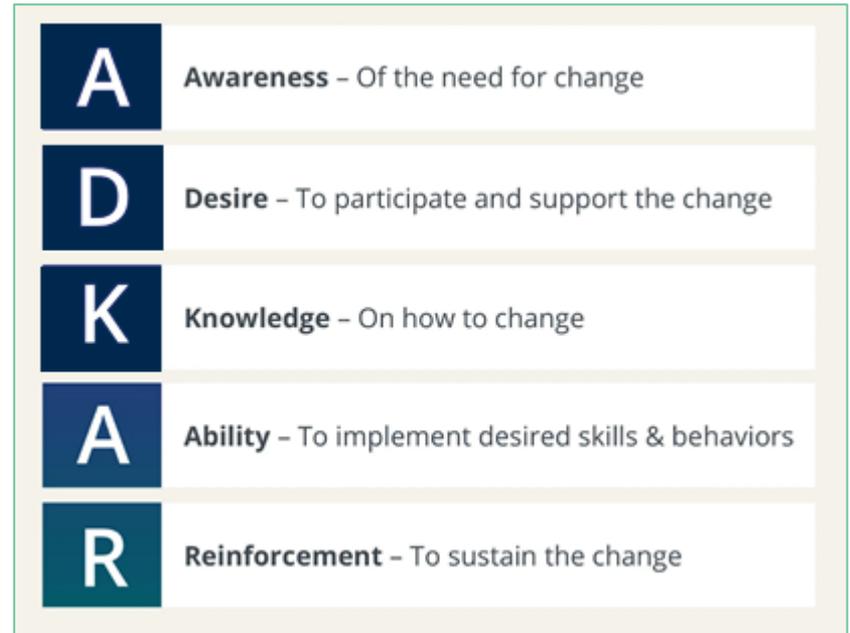
Poll Question 3:

What have you found to be the key factors in successful change management? (select all that apply)

a. Project Planning
b. Thorough Requirements
c. Key Stakeholder engagement
d. Communication (project scope, rollout, strategy and schedule)
e. All the above

Poll Question 3 Results: (Placeholder)

ADKAR Model

❑ Outlines an individual's journey, five outcomes, to achieve successful change

❑ Based on the understanding that organizational change can only happen when individuals change

❑ Helps to identify any barrier points to change, and establish OCM activities

A	**Awareness** – Of the need for change
D	**Desire** – To participate and support the change
K	**Knowledge** – On how to change
A	**Ability** – To implement desired skills & behaviors
R	**Reinforcement** – To sustain the change

ADKAR Assessment

Change Impact	Score
Awareness of the need for change	
List the reasons you believe the change is necessary. Review these reasons and rate the degree to which this person is aware of them or the need to change.	(1 none … 5 total)
Desire to make change happen	
List the factors or consequences (good or bad) that create a desire for this change. Rate the person's desire to change, taking into consideration the motivating factors, but also their convictions and any associated consequences.	(1 none … 5 strong)
Knowledge about how to change	
List the skills and knowledge needed to support the change, including if the person has a clear picture of what the change looks like. Rate this person's knowledge or level of training in these areas.	(1 none … 5 highly)
Ability to change	
Considering the skills and knowledge identified in previously, evaluate the person's ability to perform these skills or act on this knowledge. Rate this person's ability to implement the new skills, knowledge and behaviors to support the change.	(1 none … 5 very able)
Reinforcement to retain change	
List the reinforcements that will help to retain the change. Are incentives in place to reinforce the change and make it stick? Rate the reinforcements and how these help support the change.	(1 not helpful … 5 very helpful)

OCM Deliverables by Implementation Stage

	Initiate	Analyze	Build	Validate	Convert	Optimize

		Analyze	Build	Validate	Convert	Optimize
OCM Deliverables		• Readiness Assessment • Change Mgmt Strategy, Plan • Stakeholders Analysis	• Communications Plan • Training Strategy • Reward, Reinforcement Plan • Success Metrics, Monitoring	• Training and Knowledge Transfer Plan (KAP) • Track Performance, Adapt	• System Help, Support, SOP Communications • Training Tracking, Metrics • Track Performance, Adapt	• Review Performance (Lessons Learned)
Approach (examples)		eMails, newsletters, town hall and/or department meetings	Training/reference guide, videos, Terms & concepts, cross-reference glossary, white/role/position papers, SME workshops	basic navigation, video recordings, simulation programs	Instructor/self led, tips & tricks, role & transaction-based courses, Day-in-the-Life Job Role Workshops	power user role-based add' courses, admin & technical support training

Awareness — **Desire**

Knowledge

Ability — **Reinforcement**

Poll Question 4:

Is your organization's culture flexible enough to adopt change?

a. Yes
b. No
c. I'm not sure

Poll Question 4 Results: (Placeholder)

Conclusions & Key Take-Aways

Conclusions & Key Takeaways

1. There's risk to any implementation, its a matter of identifying them early and aligning on a resolution. Working with a strong SI will curb at least 70% of this risk from the start.

2. Just as every company has different business goals, change management is also different for every organization. It must be tailored to meet requirements based on the key stakeholders' inputs and specific challenges of the organization.

3. Focus on people and their "needs" and "wants". This model will help define what each departments current and future goals attainment looks like.

1 Risk Identification & Management

Unique Req'ts of the Business **2**

3 Focus on People

Questions and Answers

Hamza Zia
Director of Solution Architecture
Myers-Holum

Sue Khawaja
Business Development Manager
IMA

Final Reminders

► **Complete the Evaluation poll** – 2 options
  - On your screen
  - Evaluation Survey icon at the bottom of your console

► **Access to your CPE Certificate** – 2 options
  - Click the "CPE" icon at the bottom of your console
    <u>or</u>
  - Click the link in your post-event e-mail

► Please print a copy of the CPE certificate for your records.

► Your CPE credit will be automatically recorded in your transcript.

Thank you!

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