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Complete Guide to Cloud ERP Implementation

Set your business up for success by building a plan, establishing a team, and pinpointing KPIs for your ERP implementation.

When evaluating ERP systems, implementation should be a key consideration. Historically, ERP systems required extensive customization, which meant programmers had to spend lots of time helping with your implementation. And even now, some vendors offer systems that require heavy customization. Other vendors, however, approach ERP implementation differently. NetSuite, for example, has best practices for companies of your size in your industry baked into the system's design. It thus takes less work to tailor the software to your unique business needs, greatly reducing the time and money required for implementation. You may have done implementations before, but you haven't done one like this—and it's a game-changer. Even with the right vendor and system, ERP implementation requires careful planning, execution, and follow-up

Understanding the 7 Stages of ERP Implementation

Discovery and Planning:
Choose an ERP system that meets your needs and goals. Check vendor references and use RFPs with your implementation team to select the best fit.

Design:
Detail your current workflows and identify improvement areas. Start with financial functions and gather user feedback to ensure the new system meets your needs. Plan necessary configurations and customizations.

Development:
Configure and customize the ERP system, integrating with other systems as needed. Create user manuals and training materials to support the transition.

Data Migration:
Plan and execute data migration carefully, including data cleaning, mapping, and validation. Consider phased imports to manage complexity.

Testing:
Conduct ongoing testing to refine the system and resolve issues. Begin user training with vendor resources and your own materials.

Deployment:
Prepare for go-live with thorough planning. Address any issues, migrate recent data, and focus on training and support for user adoption.

Support and Updates:
Expect initial support from the implementation team and ongoing assistance from ERP providers for further adjustments and configurations.

Implementation Strategies

There are four primary options companies have when implementing an ERP system.

- **Big bang:** A business goes live with all modules and initial customizations at once. While riskier than other options, it allows the company to realize the full benefits of the ERP system right away.

- **Phased rollout:** The business launches various modules, features, or processes over weeks or months for "quick wins." They might start with a crucial module—finance is a popular choice—and address any issues with it before moving on to supply chain management.

- **Parallel adoption:** An organization runs its existing ERP or accounting system alongside its new one for a set period. This mitigates risk since the old system is there as a backup, though running dual systems can cause a host of data problems and unnecessarily consume resources.

- **Hybrid:** Any combination of the above strategies is a hybrid approach. For example, a company could use a big bang strategy for its subsidiaries but a phased approach for its head office.