Going from Today to Tomorrow

How to Successfully Manage an ERP Implementation

Chuck Gordon, Director of Professional Services, Tyler Technologies
You’ve made the decision to implement a new ERP system...

So now what?
Start with the “Why”
Establish Sense of Urgency & Build a Powerful Coalition

Create a Vision

Plan for and Create Short Term Wins

Consolidate Improvements & Produce More Change

Institutionalize New Approaches

John Kotter, Professor of Leadership at Harvard University, HBR, January 2007, “Leading Change: Why Transformational Efforts Fail”
Change

What is it?

What are the causes?

What are the intended benefits?

What are the perceived risks? What are the actual risks?

Are they the same or different?

What are the goals/targets/desired outcomes?

What are the success measurements?
<table>
<thead>
<tr>
<th>Change Impact</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are affected the most? Least? Not at all?</td>
<td></td>
</tr>
<tr>
<td>Who might be affected if the change didn’t occur (i.e. what's the impact of inaction?)</td>
<td></td>
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<tr>
<td>Will the change be an add to or a replacement of something that is already in place?</td>
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<tr>
<td>What is the timeline for the change?</td>
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<tr>
<td></td>
<td>How does it change the impact?</td>
</tr>
<tr>
<td></td>
<td>How does it change the benefits?</td>
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<tr>
<td></td>
<td>How does it change the preparation / communication?</td>
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<tr>
<td>What are the reasons this change effort succeeds? Fails?</td>
<td></td>
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</table>
Change
Execution

Who needs to know – when do they need to know – what do they need to know – why do they need to know

Who will communicate – when will they communicate – how will they communicate – what will they communicate

Gain engagement and buy in

Discuss the need for change – early
Involve in the design of the change
Test theories
Create an advisory
Change Matrix

- Impact:
  - High
  - Low

- Involvement:
  - Low
  - High
## Change Matrix

<table>
<thead>
<tr>
<th>Impact</th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjacent Groups in the Organization</td>
<td>Support System</td>
<td>Primary Stakeholders Those who will execute the process</td>
</tr>
<tr>
<td>Approvers Exec. Leadership Clients</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **High Involvement**
  - Approvers
  - Exec. Leadership
  - Clients

- **Low Involvement**
  - Support System

**Adjacent Groups in the Organization**

**Support System**
The Change Chain

High involvement / High impact

Stakeholder → Stakeholder → Stakeholder → Stakeholder → Stakeholder → Change Delivery

The system supporting the chain - High involvement / Low impact
Triple Constraint
Project Stages

1. Initiate & Plan
2. Assess & Define
3. Build & Validate
4. Final Testing & Training
5. Production Cutover
6. Closure
Leadership

- sound judgment
- provide vision
- provide direction
- coach/mentor team
- issue & conflict resolution
- effective decision making
✓ Approach the change strategically
✓ Select the PM carefully
✓ Invest the necessary resources in the project
✓ Invest the time in training and learning
✓ Evaluate business processes prior to implementation
✓ Institutionalize the change

Value realization requires stakeholders to Adapt, Adopt and Engage.
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Appendix
• Determine the desired future state
• Perform org readiness and impact assessment
• Choose a project manager
• Determine obstacles to success
• Ensure accountability
• Create a Vision and Mission
• Identify success factors and measurements
• Institutionalize the change

Getting to the future requires leaving the past