I hate this*#!&% computer!

By David Teeger Implementing a new software system requires planning, experience, and a basket of skills most IT departments have not had the time to develop

How often have you thought one of the following?

- It takes too long to enter all this information!
- I can't get the report I want even though the information is in the computer!
- These reports don't balance. Which one should I believe?
- Why does it cost so much to have something changed?
- Why can't our computers talk to each other?
- Our competitors have this information; why can't we?

Too often, probably. You purchased your computer system from a vendor whose software was customized for your industry, who seemed to know what he was talking about, and whose references were all happy. So what went wrong?

Potentially, a number of things. Most organizations embark on the extensive —and expensive —task of new system implementation without having all the necessary parts in place. Selecting and implementing a new computer system requires planning, negotiation, analysis, project management and, perhaps most important of all, experience. But seldom do the needed skills reside within a company's existing IT staff. Since businesses typically upgrade their systems every five to 10 years, their in-house computer experts' know-how lies in maintenance and tech support — not implementation. Consequently, the vital job of implementation gets assigned to the person who "knows the most about computers." This is like asking a taxi driver to fix your car.

Whether you manage the project internally or hire a professional systems consultant to do it for you, there are a number of things to keep in mind when updating your current system. The following serves as an indispensable checklist.

The selection process

- Get management's commitment and a pre-approved budget.
- Select a steering committee from the users who best know your business operations.
- Create a list of your business requirements of a new system and classify them as critical, important or "nice-to-have".
- Create a group of daily operational scenarios that a computer system would be required to manage.
- Research the software solutions in the marketplace that might meet your company's needs.
- Review your specific criteria with vendors and evaluate them against offers from other vendors.
- Invite the best candidates in to demonstrate their software.
- Manage the demonstration day yourself and make sure you see what you want to see rather than what they want to show you.
- Identify any gaps between the software solutions and your business scenarios.
- Identify all software and implementation costs, including those of filling those gaps, either procedurally or through modification of the software.
- Consider the compatibility of systems that will have to "talk" to the new system.

The implementation process

- Work with the steering committee and vendor to set realistic targets for the project, then document and distribute the projected timeline.
- Manage the expectation level and change factors within your company early in the process.
- Decide how you are going to fill the gaps identified earlier; they will not go away on their own.
- Prepare data to be converted to the new system, while keeping in mind the adage about "garbage in...".
- Make sure data uploaded to the new system has not been corrupted. Conversions have a way of making "garbage out," even without your help.
- Do not shortchange the training process. Attend with your specific business scenarios in hand and learn how to process them on the new system.
- Train the trainer — otherwise the company moves at the speed of the slowest operator.
- Practice, practice, practice! Make sure every department understands how to process its specific business scenarios.
- Perform as many tests as necessary to be certain the new system is fully functional, especially with interfaced systems.
- If you have the staff to run parallel, do so. If not, find another way to fully test the system before going live.

The go-live process

- Plan the pre-go-live process as a project in itself.
- Manage the expectation levels and change factors. They are critical at this time.
- Close off the old system properly by printing off reports, etc. It will most likely not be freely available after the go-live.
- Set and enforce appropriate cut-off procedures.
- Make sure you have built "dead time" into the plan in case glitches occur after the go-live date.
- Don't sweat the small stuff — there will be enough big things to worry about.
- Keep detailed notes of items that need correction and review them after the go-live.
- Wait a few months before performing any modifications. This way you will end up doing only the ones you really need and you will implement them in a more controlled manner with less ill effect on your overall system.

Some important don'ts

- Do not buy the sales representative. Buy the system and the company instead (you'll need them longer).
- Do not think that, because you were trained, you're fully familiar with the system. Does someone who just received a driver's license truly know how to operate a car?
- Use the system as it was designed and resist the urge to overdo modifications when you first go live. Every modification delays the process and makes you a guinea pig. If you want what you had on the old system, why did you buy the new one?
- If you do not have the manpower to do it all at once, go live in phases by business function, e.g. Demand functions (order entry, invoicing, accounts receivable, finished goods inventory control), or Sourcing functions (purchasing, manufacturing, bill of materials, raw materials inventory control) or Accounting functions (accounts payable, general ledger, financial statements).
- Do not go live prematurely for the sake of meeting a deadline. It isn't worth putting your business at risk.
- Don't think the vendor's professional project manager will manage your interests or your part of the implementation. They are hired to manage their own.

The old maxim

Remember that a second-rate system with a first-rate implementation far outweighs a first-rate system and a second-rate implementation.

Now you're ready. So take the car to the garage, let the taxi driver take you home, and sleep well. ∎

David Teeger C.A. is a partner at Teeger Schiller Inc., which has offices in Toronto and Montreal. For the past 25 years, he has been involved in computer-based consulting assignments and system selections as well as implementations for the consumer products sector, including manufacturing, importing, distribution, retail and associations. To learn more about Teeger Schiller, visit www.teegerschiller.com.

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David Teeger
Director

David Teeger C.A., C.A. (S.A.) graduated as a Chartered Accountant in South Africa, and upon arrival in Canada he obtained his Canadian C.A. designation and joined Richter & Associates, a management consulting firm, where he concentrated his practice on various business sectors including household goods, fashion, automotive parts, public associations, and retail chains. He performed many roles in his 15 years at Richter, including managing the professional services organization in North America and all business operations throughout Europe.

David's professional capabilities include computer audits, feasibility studies, system analyses and assistance in the selection, negotiation and implementation of computerized solutions.

As a founding partner of Teeger Schiller Inc., he has focused his practice on consulting to management. His team of professionals has helped businesses select and successfully install a variety of ERP business solutions and add-on systems including business intelligence solutions to give new life to existing computer systems. David's clients not only rely on him to successfully manage the implementation of their new systems, but to manage the change that occurs in their organizations as a result of the use of these new tools.

Elliot Schiller
Director

Elliot Schiller, Ph.D., C.M.C. began his career as a Chemical Engineer working for Grumman Aircraft, in Long Island, New York. He obtained his Ph.D. at the University of Pittsburgh with funding from the U.S. Atomic Energy Commission, and, after being awarded a Presidential Fellowship, he went on to perform research and development activities at Brookhaven National Laboratory.

Since coming to Canada, he has primarily assisted consumer products and retail organizations in a variety of strategic management initiatives, traveling around the globe on behalf of his clients. In 1987, Elliot joined Richter & Associates, and it is here that he first met David Teeger.

As a founding partner of Teeger Schiller Inc., he has focused the SR&ED / Grant Division on obtaining grants and tax incentives for over 100 companies in the small to medium sized business sector. His team has provided services to the discrete / processing manufacturing, material development, textiles, apparel, automotive and computer sciences sectors. Annually, Teeger Schiller Inc. secures more than $5 million in government funding to assist its clients in having their business initiatives supported by government funding.

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