Changeover Checklist

7 STEPS TO SUCCESS

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Tackling a technology change can be daunting, but it's certainly not impossible, and change – when done right – is totally worth it. Here, we explore seven steps that can help your distribution company laser-focus on upgrading a new technology solution so you can move on to outperforming, outsmarting, and *out-serving* your competition.

STEP 1: CLARIFY YOUR PURPOSE

You're in the distribution business, which means choosing an ERP solution must be viewed through that lens. **What specific challenges must your technology upgrade solve?**

- ☐ I need access to accurate, real-time data so I can make more confident decisions.
- ☐ I need better/faster/smarter insight into how I can better serve my customers.
- ☐ I need better/faster/smarter insight into how I run my operations more efficiently.
- ☐ I need to eliminate silos and integrate disparate data systems/sources.
- ☐ I need to improve my customer experience across all departments.
- ☐ I need to eliminate manual/repetitive efforts so we can focus on innovation.
- ☐ I need to strengthen/streamline regulatory compliance.
- ☐ I want stronger top-line growth by implementing innovative ecommerce and mobile capabilities.

By clearly defining what your company is looking to achieving, you'll be on more solid footing when vetting potential technology solutions.

STEP 2: DEFINE YOUR PROJECT SCOPE

Now that you know what you're looking to accomplish with a technology change, it's time to define your project scope. But where do you start? How do you focus your efforts?

It's easy:

Analyze your customer experience.

(HINT: Be as specific as possible!)

- What processes are working?
- What processes fall short?
- Do you have the information you need to serve your customers as efficiently as possible? What reports need beefing up? What reports are missing entirely?
- Where is your team wasting time on manual efforts?
- Where are costly mistakes being made? Be sure to consider both time and money.
- Where are you losing out on opportunities for additional sales?

Using the following formula, define potential objectives.

(Hint: Think in terms of new processes, new revenue, and cost reduction)

Revise/Improve/Add/Automate [X] in order to [Y] so that we can [Z].

Example:
Automate **[promotional announcements to applicable customers]** in order to **[eliminate missed opportunities]** so that we can to **[boost revenues with minimal effort.]**

Prioritize your objectives.

MANDATORY	VALUE-ADD	NICE TO HAVE

STEP 3: MITIGATE CHANGE RESISTANCE

The number one reason new system implementation fails is poor change management. So, the first step is to identify influencers and advocates for your new system who will help get your team on board for change. Then, working together, develop a plan to communicate **value,** specifically with regards to **how your proposed technology solution will eliminate pain points.**

Circling back to STEPS 1 and 2, take some time to brainstorm how the technology upgrade will simplify and enrich your teams' lives. Be realistic in expectations and required time-commitments, but clearly communicate the positives to:

EXECUTIVES | COACHES | END USERS

As you go through the process, continue to reinforce the positives with success stories and progress recaps –– and don't forget to ask for (and address) feedback.

STEP 4: GATHER DATA SOURCES

Your new ERP solution will only be as good as the data that feeds it. Accuracy is key. Now is the time to review your current technology/software stack, i.e. the systems currently being used for accounting, inventory, tracking, shipping, etc. The goal is to identify relevant data sources that will need to be migrated into your new ERP solution. And, because data is usually spread across multiple sources with varying structures and formats, the data will need to be normalized prior to migration.

Example

DATA SOURCE: **Quickbooks**
PURPOSE: **Financial & Accounting**

DATA SOURCE: _____
PURPOSE: _____

DATA SOURCE: _____
PURPOSE: _____

DATA SOURCE: _____
PURPOSE: _____

CURRENT SYSTEM: _____
PURPOSE: _____

STEP 5: ASSESS THIRD-PARTY ADD-ONs

Chances are your company relies on a variety of third-party add-on services to help get things done. These include CRMs and whatever solutions you use for financials, routing, warehouse automation, demand forecasting, and more. If you are looking to simplify and automate, take note of what can and cannot be integrated into your ERP solution. If it can't be integrated, do you need to keep it? Or is now the time to migrate to another solution that works with your ERP?

Example

3RD PARTY ADD-ON:
Warehouse Automation Software

- ☐ KEEP
- ☐ ELIMINATE
- ☒ INTEGRATE (API Available? (Ⓨ) N)

3RD PARTY ADD-ON:
_____

- ☐ KEEP
- ☐ ELIMINATE
- ☐ INTEGRATE (API Available? Y N)

3RD PARTY ADD-ON:
_____

- ☐ KEEP
- ☐ ELIMINATE
- ☐ INTEGRATE (API Available? Y N)

3RD PARTY ADD-ON:
_____

- ☐ KEEP
- ☐ ELIMINATE
- ☐ INTEGRATE (API Available? Y N)

3RD PARTY ADD-ON:
_____

- ☐ KEEP
- ☐ ELIMINATE
- ☐ INTEGRATE (API Available? Y N)

STEP 6: MAP OUT A DEPLOYMENT PLAN

Using information gathered in STEPS 3, 4 & 5, it's time to prepare to deploy.

PROCESSES	• Whiteboard out high-level processes • Outline solutions for identified pain points • Consider standardization opportunities
TECHNOLOGY	• Identify available technical resources • Identify & pursue integration options • List out customization needs
BUSINESS	• Determine business requirements • Discuss future and high-level business objectives • Identify change management resources
PEOPLE	• Assemble a changeover team • Develop an onboarding and training plan • Gather and implement feedback
REPORTING (Real-time, Daily, Weekly, Monthly)	• Define visibility requirements by department • Define reporting requirements by department • Identify your financial reporting needs
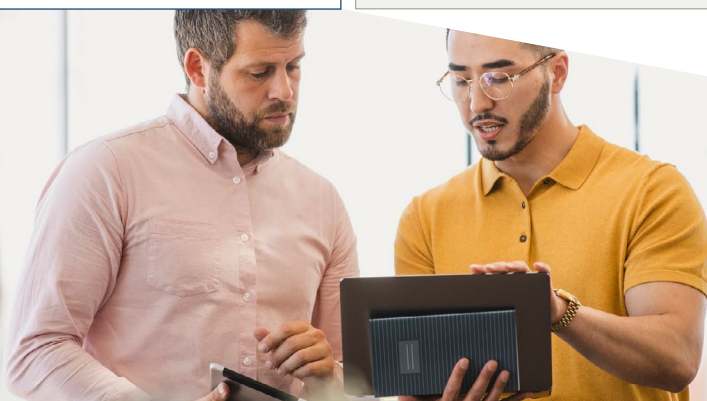
STEP 7: GAME PLAN YOUR SUCCESS

Upgrading technology is a process. That's why it's important to game plan your success with metrics that help your team "see" the positive changes their hard work and support have helped bring about.

Take the time to:

- [ ] Create starting benchmarks so you can easily see how far you've come
- [ ] Share major milestones company-wide
- [ ] Develop and communicate performance goals
- [ ] Perform regular Health Checks to make sure your digital strategy remains on point.

Are you ready to reap the rewards of a technology change?

Let's start the conversation.

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