

Proposed week of go-live: ___/___/____ - ___/___/____

Overview

The following is a detailed suggested implementation plan for [your company] based on a target cut-over / go-live date of ___/___/___ - ___/___/___ . Note that the below schedule is simply a rough outline. Cetec ERP will remain flexible to accommodate the employee availability, perceived critical needs for support and system configuration.

The plan centers around [your company]'s desire to move core business process away from legacy system and onto a fully integrated ERP system. To accomplish this task, legacy system must be “dethroned” as the authoritative data source and replaced with Cetec; an explicit cut-over date is needed by which the [your company] user base stops entering data into legacy system and starts entering data into Cetec. This requires that the [your company] team be trained on how to perform their critical job functions related to data entry/delivery in Cetec, versus how they used to perform them in legacy system. Support will be provided for process changes incurred by the switch; time with your company's super users and/or ERP project contacts will be crucial to facilitating the change. On-site time will be focused as such.

Regarding Implementation Approaches: Some businesses often take a “phased” strategy to putting their business on a long term path toward a single integrated ERP system in Cetec. E.g., a company will implement Cetec ERP's Quality module with the longer term aim of migrating all departments to Cetec. However, because [your company] desires to move the core business functions to Cetec, there are certain areas of the system which are more efficiently moved together as a unit, namely order processing, purchasing, inventory control, warehousing/receiving/shipping, and accounting. The interrelated dependencies between these system functions are vast, and phasing out implementation of each requires redundant data entry and transactions to maintain the implementation, which usually redounds to a costlier implementation than simply knocking it out all at once.

The below implementation plan aims to facilitate a successful migration of [your company] sales and order entry, purchasing, receiving, warehousing, inventory control, work order fulfillment, shipping/invoicing, and accounting functions from legacy system to Cetec ERP.

There are some areas of the system that can be easily segmented and treated as a “phase two” to optimize smoothness of implementation and operational stability, e.g. CRM, Shop floor (routing, work instructions, labor tracking), Quality control, etc. These do represent key operational areas and “low-hanging ROI fruit” for [your company] to take advantage of at their own pace as part of a Phase Two migration from paper/spreadsheet processes into Cetec ERP.

5-10 Weeks To Launch

- Approve quote from Cetec ERP, identifying all optional implementation packages (e.g. basic/advanced data load, one week on-site consulting, etc.)
- Settle on tentative dates for launch / on-site implementation consulting.
- PO for upfront costs (or permission to charge credit card) delivered to Cetec ERP.

(pending approval and PO from [your company])

- Login info to new system delivered to [your company].
- Cetec ERP to book travel to customer site for on-site implementation.
- Existing [your company] legacy system data exported to .csv file format and delivered to Cetec ERP for review.
- Cetec ERP to perform initial data load of data received from ERP project manager.
- ERP project contact(s) to perform initial data validation and deliver assessment to Cetec ERP.
- Cetec ERP to refresh data per [your company] requests from above assessment as necessary.

2-4 Weeks To Launch

- Active work with ERP project contact(s) on data import, validation, refreshes - est. 10 hours (incl. in advanced data migration package).
- Cetec ERP to refresh data per [your company] requests from above assessment as necessary.
- Clean data set is achieved in ERP and the table is set for [your company] internal training to begin.
- Remote training and preparation - sessions 1-3 (see “Cetec ERP Training Checklist” for reference). Grade users per Training Checklist; identify any perceived gaps and/or required process changes among user base to accomplish critical job functions.

1-2 Weeks To Launch

- Any remaining work with ERP project manager on data import, validation, refreshes.
- Remote training and preparation - sessions 4-6 (see “Cetec ERP Training Checklist” for reference). Grade users per Training Checklist; identify any perceived gaps and/or required process changes among user base to accomplish critical job functions.
- Final prep, user setup, configuration settings, etc.
- Prep/training on naming schemes, i.e. how to easily identify legacy system data versus new Cetec ERP data.
- Final data wipe and refresh before go-live date of ___/___/_____.

As needed leading up to go-live: bi-weekly project mgmt phone calls, webinar training sessions, data validation, etc.

Representative Week of Implementation (___/___ - ___/___)

	Monday	Tuesday	Wednesday	Thursday	Friday
before hours	Announce Cut-Over (Internal)				
8am - 9am	Debrief / Planning	Debrief / Planning	Debrief / Planning	Debrief / Planning	Debrief / Planning

9am - 10am	Order process flow/overview & rough user assignments per stage of fulfillment. Distribution of "how-to" literature per critical job function.	Order flow/overview - make adjustments as needed to user assignments per job role. Identify any specific training needs.	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users
10am - 11am	Sales/Order entry training.	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users
11am - 12pm	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users
1pm - 2pm	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Debrief / Planning
2pm - 3pm	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Training/Support as needed by ERP super users	Debrief / Planning - planning ahead for Phase 2 items.
3pm - 4pm	Review of crucial custom configuration, development, data adjustments, integration, etc. -- hear requests from ERP super users and determine prioritization of items.	Review of crucial custom configuration, development, data adjustments, integration, etc. -- hear requests from ERP super users and determine prioritization of items.	Review of crucial custom configuration, development, data adjustments, integration, etc. -- hear requests from ERP super users and determine prioritization of items.	(open - critical needs)	Debrief / Planning - planning ahead for Phase 2 items.
4pm - 5pm	Ship Product; Apply Cash!	(open - critical needs)	(open - critical needs)	(open - critical needs)	Final Debrief
after hours	Deliver timeline of open items identified in above 3pm-4pm session.	Adjust timeline of open items identified in above 3pm-4pm session.	Adjust timeline of open items identified in above 3pm-4pm session.		

* The above schedule is a **ROUGH** outline. Cetec will remain flexible to accommodate the employee availability, perceived critical needs for support and system configuration, and we guarantee that that flexibility will be required of us. The above schedule is only a general outline, and is in no way intended to demand [your company] personnel availability at the requested time.

Post Implementation

- Dedicated unlimited email support.
- Ongoing phone/webinar support package available (Priority Support)