

CETEC ERP

Implementation Roadmap: How Do I Launch Cetec ERP At My Company?

Choosing An ERP Partner & Approach

Implementing an ERP system requires transitioning existing processes and related business critical data, in addition to training employee personnel on new processes in a new system.

This guide will outline the steps you need to take to achieve a successful ERP implementation.

The infographic to the right visualizes a “big bang” approach to implementation, where data conversion, training, and process modeling work is frontloaded, followed by a definitive “cutover” point (typically over a weekend) whereby legacy systems are dethroned and Cetec ERP becomes the authoritative data source. This is the most common and effective implementation approach for smaller businesses; other implementation project approaches included phased rollout of distinct modules, parallel systems adoption, or a hybrid approach.

Whatever approach you take, your first milestone to tackle will be **choosing an ERP implementation partner** to assume ownership of the project objectives. You may either: choose to leverage Cetec ERP’s own in-house implementation project services; utilize your own in-house ERP implementation team; utilize the services of a Cetec ERP certified implementation partner; or utilize the services of a third-party ERP implementation provider of your own choosing.

First Step - choose an ERP implementation partner, and schedule a project kick-off with them to determine ERP implementation approach, strategy, timeline, and schedule.

If you choose to use Cetec ERP in-house services for your implementation, we will likely recommend the “big bang” approach, but will adjust based on your needs. The remainder of this guide represents the Cetec ERP standard approach to implementation projects, not necessarily your specific desired approach nor the approach of any of our certified partners.



Milestone - Preparation (Data, Process, Training, and Configuration)

Data Conversion

We recommend focusing on getting data converted *first*. This sets a foundation for better training and faster adoption of the new system, as users tend to understand better when they are viewing data they are familiar with.

Cetec ERP handles data transfer in a software driven reproducible process, routing the data desired for migration through a set of programs to transform and load the data from spreadsheet format. Thus, the bulk of data conversion work is front loaded to the creation of these programs (once the suite of transforms is created, a refresh is a minor event [often 15-20 minutes]), and enables you to do recurring data refreshes and testing and validation in the weeks leading up to launch. By go-live, the whole process has been done so many times that the transition is relatively mundane.

Process Modeling & Documentation

Once data is reasonably in place, Cetec ERP experts will work with your “super user” group to explore the process of transitioning your current critical business processes onto the new system, identifying any areas where process will fundamentally change for your employees as opposed to staying essentially the same. Ideally your company will record and take ownership of these new processes and distribute them to the employees who will be performing those functions.

Training

Training is our attempt to help you distribute the knowledge of the above new processes to your group of users. “Training” is a catch-all which encompasses both direct user training (how is a task performed) and also process consulting (what is the best way to model a task). Process consulting usually begins during the sales and discovery process and continues through user training as users are instructed on how to perform existing job functions in the new environment.

Training meetings are typically held weekly, and focus on a distinct area. Employees whose job functions include that area are included (or at least key stakeholders who will be responsible for internal training), and will have access to a Cetec ERP environment where they can practice the skills covered in the respective training sessions. This environment will be populated with the recurring data loads, which not only provides the users with familiar data for interaction but also

helps to validate that the data loaded is accurate. Job training checklists may be assigned as “homework” for you users to prepare ahead of time, allowing you a measurable method of gauging readiness of your team to successfully reproduce their current processes in the new Cetec ERP system.

Configuration

Cetec ERP is a software framework that we adapt to your business processes. Customizable ERP software enables you to quickly change process to achieve new measures in markets with strict and diverse manufacturing regulations.

Cetec ERP provides your company with flexibility to adapt quickly and affordably to opportunities for new business and growth. Any custom development will inherit from the core Cetec ERP framework, extending the program to meet specific requirements without fully locking your business into a dead end software process.

This methodology enables us to sustain the software structure needed to ensure you always receive latest releases and upgrades (which are included in your subscription cost), while still allowing you to set your own behaviors, so you do n’t have to develop your own internal custom system. It is an ERP structure, but it is a structure we adapt to you.

Milestone - Final Cutover & Go-Live

Final Cutover

The Cetec ERP team will work with you to coordinate your final data exports, final data imports, and the sequence of events needed to execute to smoothly transition from your legacy system to the Cetec ERP environment.

Go-Live

Cetec ERP offers on site consulting services for support, training, process consulting, and tailored system configuration to help you achieve a fast and successful cutover from your legacy systems and processes.

Our in-house team of experts quickly deploy your environment, configure the system to your needs, train your team on critical business processes, and make custom programming changes if needed. Cetec ERP is flexible and our consultants are software experts and manufacturing industry veterans, which makes for a rapid, practical, and stable ERP switch.

Milestone - Success & Transition To Ongoing Support

Upon completion of your implementation project, you need to transition to a new avenue for questions and assistance outside of the specific training or consultant who helped you go live. This will ensure your team can access fast and reliable help even after your Cetec ERP trainer and/or consultant have left the building.

Cetec ERP normally recommends you establish lines of support *internally*, i.e. clear representative “champions” inside your company who are most familiar with the system, and who can act as the most immediate line of help if and when questions arise from your user base. This front line of support will help your users get the most efficient help possible.

From there, your method for reaching the support department (and expected response time) may depend on which Support Plan you are on. You will either be on a support contract with a third-party Cetec ERP partner for support (e.g. if you had a third-party manage your implementation) or you will be on one of three Cetec ERP support plans: Lite, Standard, and Enterprise.

Select A Cetec ERP Support Plan

Lite Plan

Requests for help can be submitted via email or the ticketing system, and are handled as capacity allows with no guaranteed response time. This plan is recommended for small companies with non-critical use of the ERP system. Additionally, online documentation and help resources are unlimited and may be accessed at cetecerp.com

Standard Plan

Requests can be submitted via phone/conference, email, or the ticketing system, and are handled promptly, ahead of requests submitted by customers on the Lite support plan. Hours of support are from 9am – 7pm EST, Monday thru Friday.

Enterprise Plan

Requests can be submitted via phone, email, or the ticketing system, and are handled urgently, ahead of requests submitted by other customers. Initial response to requests will be within 2 hours, 9am – 7pm EST, M-F (weekend support as arranged).