

Plus...
9 warning
signs to
send you
running!



9 Questions Nobody Asks Their ERP Partner ...But Should

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Your choice of implementation partner can make a world of difference. The right partner will deftly manage the project to deliver a system that fuels your business growth. The wrong partner will stumble through the implementation, disrupting your business and costing you money.

So how do you make the right choice?

Ask tougher questions. Every partner is ready with prepared answers to the common questions about costs, experience and implementation methodology. But deeper questions that force partners to think will uncover far more about their business practices and commitment to client success.

A great technology partner will welcome the tough questions, eager to share what makes them unique. They will engage the services team to help provide you with complete, honest responses.

To help you identify the great partners out there, we've gone straight to the source. We've collected questions and advice from recognized top ERP (Enterprise Resource Planning) and CRM (Customer Relationship Management) implementation partners you can use during your evaluation process.

Your business management systems are the foundation for your future. Go ahead and ask the tough questions. Your future depends on it.

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Our team says

Look for an ERP partner that truly listens to you. A company should spend the time to understand your needs in detail, and ask plenty of their own questions, before they think of trying to sell you anything.

See...
9 warning signs to send you running!



1. What makes your implementation process successful?

Even though business management systems have become more intuitive and user-friendly over the years, implementations are still tricky. Fundamentally, you need a partner who will understand your business requirements and apply the software functionality to improve processes and profits. Ideally, you want to choose a partner who can demonstrate they have successfully completed implementations many times over. Ask them to show you proof!

Define the process

Your partner should be able to clearly describe, with documentation, the phases, deliverables and expected outcomes of their implementation process. They should address how they approach at least the following:

- Requirements gathering and analysis
- Solution design
- Development and configuration
- Deployment and training
- Post-production support

Discuss potential challenges

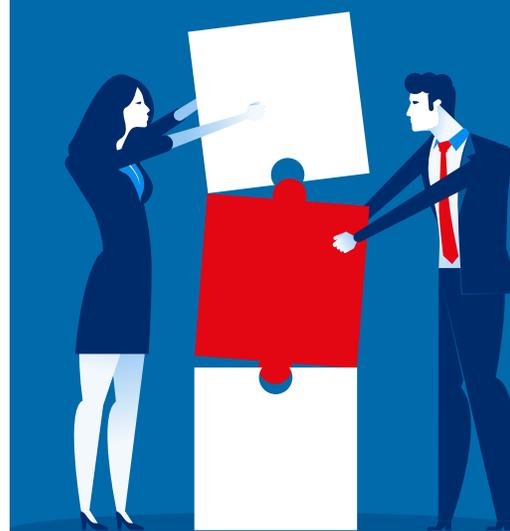
Every project hits bumps in the road and your partner should be well versed in how to smooth those out. Whether it's an undiscovered requirement or an employee resisting change, experienced partners should be upfront about potential pitfalls and how they will be handled when they happen.

Check out references

Checking references is a crucial step. The partners you speak to should be happy to supply you with names and contact information for previous customers. Call or email those references with your questions and any particular concerns you have.

Our team says

When you are given a reference you have to know the choices were filtered. During the conversation don't just ask about the final results, ask open ended questions that can give you deeper insight into the entire process, the working relationship and what is important to you.



2. How can our company contribute to project success?

An unfortunate mistake some companies make is thinking their ERP implementation partner will come in and do all the work for them. To get the most value from ERP implementation, everyone in the organization should be involved and have a clear understanding of what is going to happen, why it is happening and how they can help.

Executive leadership

A well-planned and well-executed ERP implementation will support the long-term goals of your business. The executive team, and managers of every department, should clearly articulate how the project is going to support those goals.

Working with your partner, the executive team can set a tone of cooperation and shared responsibility. Each department should understand how the system will impact and improve their business processes and productivity.

Our client says

Some people say using a consulting company is very expensive. In the beginning, I was watching the budget closely. Over time, we realized that every single time we used them, CAL made us more efficient and more effective, and the ROI was there. They paid for themselves.

- CFO, Crown Maple

Our team says

Everyone is busy but it is important to realize that if you start to miss targets and deadlines early on, it is nearly impossible to make it up later. Most organizations don't realize how disruptive and risky that is with an implementation.

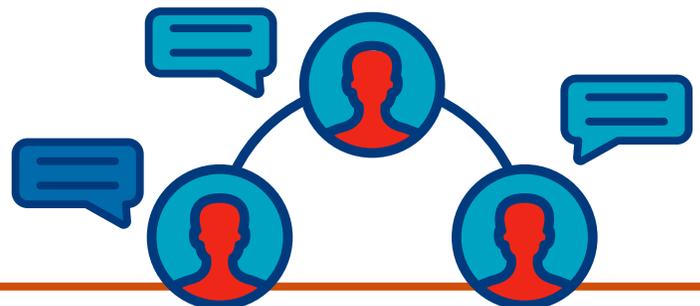
Reduce fear factors

Change is always tricky, especially if there are people in your organization who are worried about new technology replacing them. An experienced partner will suggest a proactive communication plan to help alleviate fears and highlight positive outcomes.

Give employees the time they need to be successful

One of the most common challenges during an ERP implementation comes when employees are asked to do their project-related work in addition to their full-time job. Stressed out, overworked, anxious people are not going to be able to give their best.

A clear strategy to ensure employees have the appropriate bandwidth to work on the project—from business process review through training—is critical to project success.



3. What is your approach to change management and training?

Change is hard, and if an ERP implementation is to be effective, there should be plenty of change. Your partner should be well-versed in change management with a plan from the outset to help you prepare your team.

Prepare for resistance

People are inherently averse to change, sometimes so much so that they'll purposefully derail the project. Setting up regular lines of communication should begin before the implementation. Start talking about the change before it happens, so that everyone feels included in the process. Ask for ideas for improving current processes from the people that are doing the work.

Take a phased approach

Discuss with your partner whether the project can be broken into smaller phases to minimize disruption and allow employees to become familiar with the new system over time. Working with your partner you can determine your priorities and tackle the most important problems first.

Training time

A thorough training plan includes guidance before, during and after the ERP implementation. The training plan should include different learning styles to ensure no worker is left behind. On-demand training provides those self-motivated with unlimited training opportunities, but some employees will need more hand-holding.

Our team says

Partners that offer service packages or quick start programs can have a very strict methodology. If their processes are too rigid, and you need more flexibility, that is a sign it is not a good fit.



4. How will we define and measure success?

Before taking on an ERP implementation, your organization should clearly define the desired outcomes. From the outset, your partner should be laser-focused on how the ERP system will help you achieve those objectives.

Measure the transformation

An ERP implementation should be transformational, enabling your company to achieve strategic objectives more efficiently and effectively. Whether it's geographic growth, new product lines or increased productivity, the desired outcomes should be well-defined and measurable.

Clearly define success metrics

For each of the project objectives, your partner should provide the KPIs (Key Performance Indicators) that will allow you to monitor progress. KPIs should be monitored throughout your ERP implementation, but even more importantly, they should provide ongoing feedback on company progress.

Our client says

I have spent 14 years as both the CIO and COO of a Fortune 50 subsidiary. During that time, I have overseen countless system implementations ranging in cost and complexity. While most were very successful, I cannot remember a single one that was implemented as smoothly as Acumatica with CAL Business Solutions.

-SVP, Lifeway Mobility

Our team says

Staying on budget is not always the best definition of success. The better question is, was it done right the first time? An inexpensive, rapid implementation may seem successful but later on issues may be uncovered and you realize it was not done right. Then it becomes very expensive.

Metrics defined for each function can provide the foundation for accountability and progress. A few examples of goals and associated metrics include:

Improve customer experience

- Customer ratings
- Repeat customers
- Call response time

Increase sales performance

- Average sale
- Average margin per sale
- Percent of lost sales

Increase productivity

- Transactions processed per employee
- Orders completed per employee
- Number of sales calls per employee

Increase profits

- Average margin per product/service
- Costs per employee per location
- Receivables aging

There may be specific industry-related KPIs that you need to track. Your partner should be familiar with those and provide guidance to establish the metrics that are critical for you to monitor.



9 warning signs from potential partners to send you running

1. You've only met a salesperson (or two) but they promise they have the full support of the implementation team.
2. The partner has negative employee reviews on Glassdoor, which can signal a lack of focus on the employee experience and questionable company culture.
3. The partner has limited service capabilities. For example, they don't do customizations or provide technical support.
4. Conversations are all about out-of-the-box software functionality, and not focused on your unique business processes.
5. You have to explain basic concepts of your industry.
6. Their proposed hours are significantly less than the other estimates you have received.
7. There is no training or post-implementation support included in their proposal.
8. Their follow up and response time has been slow during the sales cycle.
9. They can't provide any references for you to contact.

Our team says

If you get the feeling that the Partner is moving too fast during the sales cycle that is a warning sign. Maybe they just want a quick deal to improve their numbers, but they won't care if you are a happy customer later on.



5. How will you assign people to our project?

Project success isn't determined by the people selling the services but rather by the project delivery team. The team may include the project manager, solution architect, engagement manager and consultants. Ask your potential partner if assignments will be based on expertise related to your business requirements (not just because individuals have open time). Your partner should be happy to provide brief resumes of your project team members.

Experts with people skills

While expertise is critical to the success of your ERP implementations, personal and team skills are equally important. Each team member should bring expertise and people skills to the project.

Business acumen. Consultants should demonstrate a clear understanding of basic business functions, including financial, sales and operational process flows.

Our client says

I chose to work with CAL because of the completeness of the organization – training capabilities, customer events, technical experience, business analyst skills, and deep product knowledge. I was impressed with the members of the CAL team – they seemed happy to work at CAL and proud of the Company.

*- VP Finance,
American Institute for Foreign Study*

Our team says

You can ask to meet the team but not everyone shines in an interview. Ultimately you have to trust that the organization you choose is going to put people on your project that know what they are doing. There are always people who talk a good story. But sometimes people that talk the most are the ones that know the least.

Industry knowledge. At least some of the members on your project team should have expertise in your industry. They should understand industry requirements and be able to provide best practice recommendations.

Specialized skill sets. Depending on your project requirements, your team should include (or have access to) specialized experts. From technology to development to data analytics—ask if the experts critical to your project will be available when needed.

Training and change expertise. The goal of the project team should be to prepare your employees to be comfortable and self-sufficient on the new system. The team should be well-versed in organizational change management to help in user adoption and acceptance of the project.

Project accountability. Your project manager should clearly define how challenges that arise during the implementation will be handled.

Ongoing support. At the end of the implementation, there should be a formal handoff to the next stage of your support. You should understand who your point of contact will be and what kind of response time to expect.

6. What makes your firm more qualified than the competitor?

As you evaluate ERP solutions, you're likely to talk to a number of potential partners. Finding the right partner to work with can be as important as finding the right solution to meet your organization's unique requirements. Your partner should be ready to tell you why they believe they can bring the most value to your organization.

Industry expertise

Most of the partners you talk to will likely have an in-depth understanding of the software, but their knowledge of your industry is equally important. A partner with expertise in your industry has gained insight into best practices that other organizations use. They have learned lessons in applying the software to specific challenges and requirements of the industry that will save you time and improve the impact the solution has on productivity and profits.

Certifications

Certifications can provide insight into more than just competence in the software. The level of vendor certification (gold, silver) can indicate how closely the partner is aligned with the software vendor. Higher-level partners often have faster access to support from the vendor's technical experts.

Technical, industry and functional certifications held by the people who will work on your project indicate expertise and a commitment to learning. With the pace of change in technology today, your partner and their employees should be committed to continuous training and professional development.

A trusted advisor

While an implementation is short term, establishing a long-term relationship with your partner will deliver big dividends. Ask your partner, and talk to their references about the long-term relationships they have with clients. As a trusted advisor, your partner can help you take full advantage of your technology now and into the future.

Our team says

Look for a company that has a long track record, a good reputation in the industry and has been doing ERP implementations continuously. Also ask if the people who will be working with you are employees or outside contractors and what that will mean for your project.



7. How do you handle customizations?

Standard ERP functionality is designed to support the most common business processes. But most organizations have unique processes and requirements that aren't "standard." There are often ISV (Independent Software Vendor) solutions to fill in gaps or provide industry-specific functionality, but sometimes custom code development is required. Your partner should be ready to talk about the potential for customizations and how you will work together to find the best solution.

Industry expertise

As mentioned in previous sections, the industry expertise of your partner can make a huge difference in the success of your implementation project. If your partner has deep experience in your industry, they will be familiar with the strengths and weaknesses of the ERP system for your business. They will be familiar with the ISV solutions that can bridge gaps and they will understand what customizations may be necessary.

Our client says

Obviously it's one thing to see a product in a demo. It's another thing to work with somebody who's dealt with it and customized it for others. CAL has helped us to understand the platform, understand what we can do with it and how to customize it to work for us.

– VP, PCNet

Our team says

You should ask how customizations are done within the context of that solution. In other words, are they true customizations or are they using something like workflow logic that might be built into that core product? This can have a major impact on your ability to easily upgrade/update the system going forward.

Determine the best course of action

During the requirements analysis phase of your implementation, your project team will uncover any customizations that will be suggested or required. Your partner should have a plan for how you will evaluate options and choose the best course of action. Essential questions to ask include:

- Is there an ISV solution that will solve this issue rather than a customization?
- Would it be better to change our traditional business process for this situation rather than create a customization?
- Could we use automated workflows instead of customization to solve this issue?
- Will the customization cause us any issue during upgrades or new version releases?
- Can we custom create necessary reports that are not included in the system?
- How much experience do your developers have in creating this type of customization?

8. How often do you go over budget on implementations?

There are many reasons that a project can go over budget. Sometimes the culprit is scope creep when the project expands to address more than was originally proposed. There are projects where unknown issues come up, like an unexpected business process or integration requirement that can only be solved by a customization. Or the proposal underestimates the training and change management users need. Your partner should be able to tell you how often their projects go over budget and what processes they have in place when it does happen.

Established process and clear project plan

Your partner should have a well-documented implementation process that clearly lays out how the project will be managed. Often, your partner will not be able to provide a final project budget number until the requirements analysis phase is complete. When your budget is set, a timetable and project plan should provide guidance on what will be required of your team to complete the project on time.

Active project management

Keeping everyone on track, including your team, is the primary job of the partner project manager. The partner project manager should be working proactively to ensure you understand what resources will be needed to complete every phase of the project on time. They should be communicating regularly and actively with your project team, providing regular updates on project progress and any potential challenges to on-time, on-budget completion.

Change orders

There may be situations during your project that requires a change order, which is a documented, well-defined addition to the original plan. Your partner should be ready to explain how that process will work if the need arises.

Our team says

If you are trying to focus on everything, it is tough to get into the important details. We always recommend taking a phased approach to your implementation.



9. How does the size of your organization influence your services?

The size of your implementation partner's organization may have a significant impact on how your project is managed. A larger firm may have a wider breadth of consulting resources to draw from. A smaller, local or industry-focused professional team may provide more "personalized" service. There are several questions you can ask to find a partner that can deliver on your expectations.

A deep bench

A larger organization is likely to promote the deep bench of consultants they can bring to your project. This can be especially helpful if your project is on a fast track or is an "out-of-the-box" implementation. On the other hand, a smaller team may have more of the industry specialists that your project requires.

Our client says

I must say that CAL Business Solutions has restored my confidence in the software providers. They know the product, don't waste time, and don't bill me unnecessarily. As a business owner, that matters. CAL does business the way we do business; stand behind the product and the work and make the customer happy.

- President, Modern Tire

Our team says

Instead of focusing on the size of the company, ask the partner how many implementations they are currently working and what phases those projects are in. This is a better indicator of their bandwidth to support your project.

Experience counts

Find out if the project team has previously worked together. Teams that are assembled from remote locations may not know each other's methods and may require some ramp-up time. Teams who have worked as one on multiple projects know who is doing what and when.

Commitment to training

The size of the partner does not automatically reflect their commitment to ongoing training—which is critical to the skill sets of your project team. Ask prospective partners about the training and professional development programs they have in place for employees.

Company culture

Regardless of the size of the partner, their company culture will have an impact on your project. A great way to get insight into a company's culture is to look at their [Glassdoor](#) ratings. Current and past employees will give you an inside look as to how the company treats their employees. You want to work with a partner who values and empowers their employees.

Choose a partner ready to answer the tough questions

Finding the best partner to help you make the right choices before starting your ERP implementation will save you time, headaches and money. By asking the tough questions, you can uncover the strengths and weaknesses of the potential partners you evaluate.

Next Steps

CAL Business Solutions is ready to answer your toughest questions.

The first step is to schedule an ERP software discovery call. This preliminary discussion can help you formulate your software requirements, your budget and your timeline – even in the earliest stages of your ERP software research.

[Schedule an ERP software discovery call now](#)

During a 60 minute conference call, George Mackiewicz, the owner of CAL Business Solutions, will ask questions about your business processes, current systems and goals for a new system. Based on 30+ years of experience working with financial software George will help you determine if Acumatica or Microsoft Dynamics is a good fit for your needs. You will also receive estimates for a realistic project budget and timeline including options to deploy on-premises versus in the cloud. Remember, there is no commitment and the points reviewed during this call can help you compare all options as a more educated buyer.

We promise we will do our best to answer every question you can think of and more.

[Review Testimonials from CAL Business Solutions Clients](#)

[Contact CAL Business Solutions](#)

Our client says

We realized that while we started out looking for software, software is really not the main decision. All the packages basically can do what you need it to do, but in the end, who you want to work with is what really counts. So the decision came down to local support, the relationship we have already built with CAL and how well we were able to communicate with the people at CAL.

- MIS Director, Empire Industries



About CAL Business Solutions

Founded in 1982, CAL Business Solutions is a Connecticut-based company focused on Acumatica and Microsoft Dynamics GP accounting software.

- Acumatica Cloud ERP Highlights: www.calszone.com/acumatica
- Microsoft Dynamics GP Highlights: www.calszone.com/gp

One client described us as the “nuts and bolts guys.” We don’t wear fancy suits or close deals on the golf course. We are just a practical, hardworking team that has built our reputation by implementing the right software system to solve our customers’ issues at the right price. We don’t try to sell you extra bells and whistles that you don’t need, just because they look nice. We don’t speak in “techno jargon” or bore you with fancy PowerPoint slides. We will give you honest advice, clear goals, straightforward answers, and a software system that works.

- Get to know our team, our offices and our business values in the short video “[Meet the CAL Team.](#)”
- [Read success stories](#) outlining the business challenges, solution and benefits experienced by CAL Business Solutions clients.

If you are considering new ERP software, upgrading your existing system, or if you currently use Acumatica or Microsoft Dynamics GP and want the best local support and training, let’s start the conversation.

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