

19 Brilliant Ways to Promote ERP User Adoption



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Digital transformation has become essential to support people working remotely and to compete in a global, connected economy. That means upgrading business management systems has never been more important. And while ERP implementations have come a long way since the early days of multi-million dollar budget overruns and missed deadlines, they still require substantial financial and resource commitments from your organization.

To get the most impact from a business management solution, your team must understand and adopt the system quickly. Although today's software offers streamlined workflows and intuitive interfaces, even some tech-savvy employees tend to drag their feet during implementations.

So why is user adoption still such a challenge for organizations implementing new business management systems? There's no one easy answer. Employees may be resistant to change, training may be inadequate, change management may not have been well planned, or leadership may not be fully committed. In most cases, it's a combination of factors.

This white paper will share the knowledge gained through countless ERP implementations to help get your employees started on the right foot. Our team has shared best practices, critical warnings, and bright ideas to help you quickly realize the full value of your software investment. Read on to see how you can help your employees embrace change and take your organization to the next level.



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Plan Thoroughly

1. Build an inclusive software selection team

Members of the ERP evaluation and selection team should represent a cross-section of your organization. In addition to leaders who understand the business objectives of the implementation, include staff members who can anticipate how the software will impact day-to-day operations. Ensure that each department or business unit feels their perspective is represented in the selection process.

POTENTIAL ROADBLOCK

"Don't start out negative and ask your users, 'what doesn't work?' Instead ask, 'how can we make things better every day?' Get people to focus on improving, rather than complaining. The motto should be, What could the system do to make things better for you, and the company, every day? This gets your users into the right mindset."

-George Mackiewicz, [CAL Business Solutions](#)

2. Design the system to streamline current cumbersome processes

Take the time to clearly understand your business processes and re-design them to simplify and streamline your employees' work. Replacing tasks currently done on paper with digital processes that take just as much time won't win over your users. Design a system that will help employees accomplish more in a day with fewer headaches. Your implementation partner should be familiar with your industry and provide best practice examples to guide your workflows and business processes.



BRIGHT IDEA

"Our team at CAL used Dynamics GP for a long time, and we loved it. When we moved to Acumatica some were dragging their heels. As the business owner, the person leading the charge, I felt the only way to get to a point of acceleration was if every single employee used it every day. I found ways to make that happen. Our team became surrounded by the information they needed to do a better job. The day came when we flipped the switch, and our entire business was being run in Acumatica."

-George Mackiewicz, [CAL Business Solutions](#) ([Read our story](#))

Plan Thoroughly

3. Plan ongoing support and training before go-live

Establish and communicate a clear plan for post go-live support and training. Users need to know that they will have help transitioning to the new system. Ongoing support and training will also keep users from establishing workarounds to avoid using the new system.

4. Maintain key integrations and customizations

Don't expect users to manually transfer or enter data that the previous systems handled automatically. Missing features and missing integrations are serious obstacles that users may be unwilling to accept. Integrations with other systems and customizations that meet specific requirements should be addressed early in the planning phase of implementation.

5. Map the employee journey

Before you define the data fields and workflows needed to improve your ERP system, you need to understand where you tend to lose time and productivity. By mapping your journey from start to finish, you can align processes to help guide your team—including triggers to launch automated processes focused on historic sticking points.



BRIGHT IDEA

"Designate a committed point person. This person needs to become a rock star. They're the one who will be most involved with the implementation. They should be incredibly knowledgeable about current practices. And they need to have the fire and drive to want and get the job done!"

-Katelyn Wood, [CAL Business Solutions](#)



Lead Proactively

6. Leadership must champion the project

All employees affected by the new system should have a clear understanding of why the project was initiated and the ultimate goal for the organization. The leadership team, from CEO to department managers, should be committed to that goal and be able to explain it clearly. Leaders should be supportive of employees efforts and remain fully engaged throughout the project

POTENTIAL ROADBLOCK

"It makes sense to do an implementation in a phased approach, but you should never take away functionality or integrations that users had in the past. You can't break what they already have and expect them to like it."

-George Mackiewicz, [CAL Business Solutions](#)

7. Identify an internal project manager and key users

Before the project begins, identify a project team and project leader from within the company. All team members should be empowered to spend appropriate time on the project. That may require a reduction or reallocation of current responsibilities. The project team should be well rounded and include members from various parts of the organization. Perspectives from each team should be considered from the beginning.



BRIGHT IDEA

"You want your users to feel comfortable. The best way to do that is to keep things that are familiar to them. If they used certain terminology, rankings or color coding to represent tasks in the past, try to mimic that in the new system. Even something as simple as adding the company logo and color theme to the new system can automatically make the user feel more comfortable."

-George Mackiewicz, [CAL Business Solutions](#)

Lead Proactively

8. Leverage “Superusers” and cheerleaders

A “Superuser” is typically an employee who is enthusiastic in learning and advocating the benefits of the new system. Superusers should be included or engaged by the project team to assist with training and communications. During the project, some team members will become cheerleaders for the project—embracing change and offering support. The project team should be on the lookout for these employees and have a plan and leverage their enthusiasm and knowledge to help others.

POTENTIAL ROADBLOCK

“Some users will always find objections. If there isn't a strong leadership team to get that person to 'sit down and row with the rest of the team' it can actually derail an entire project.”

-Katelyn Wood, CAL Business Solutions

9. Prepare to be flexible

During an implementation there are likely to be unexpected challenges and opportunities. Assure everyone involved in the ERP implementation project that changes are to be expected and will be managed thoughtfully. Project team meetings should address potential changes and leadership should be fully informed of possible impacts.



“Nobody implements new ERP software just because they like change. They want to make things better. Use this as an opportunity to look at all of your processes and see what can be improved. Don't just bring all of your old habits over, pick the best ones and improve the others.”

-George Mackiewicz, CAL Business Solutions



Manage Expectations

10. Maintain consistent, continuous communications

To keep everyone informed—from leadership to front-line users—establish regular communications channels. Project updates should be honest and informative to help users feel included in the entire process. Consider using a Teams site to promote discussions, answer questions and provide an “always-on” location for project information.



“Implementing new software or even a new process means first understanding the old one. What are you doing now, how and why. The answer to “why” should not be “I don’t know, it’s just how we’ve always done it”. Perhaps the “why” is because of a limitation in the prior system that the new system would be fine with. If you can explain the “why” then it is a process worth keeping.”

-Katelyn Wood,
[CAL Business Solutions](#)

11. Establish metrics for goals and expected outcomes

The defined goals of an ERP implementation project should be clear and measurable. With mile markers, the project team can monitor and report on success. As decisions are made during the planning and execution phases, defined metrics provide guideposts to keep the project aligned to the desired outcomes.

12. Recognize the potential impact on employee workloads

An ERP implementation will require significant time from project team members and users. Employees should not be expected to maintain their full-time job responsibilities in addition to planning, testing and training. Put plans in place to offset workloads, e.g. reduce regular work, get support from other departments, hire temps, or some other method. Give employees the time they need to fully focus on their implementation assignments.

POTENTIAL ROADBLOCK

“Look, listen and learn. Many times the people who dig their heels in and refuse to support the new system, are the people who are afraid that the new system is going to eliminate their job. Look for those people, listen to them, and learn how you can address their concerns.”

-George Mackiewicz, [CAL Business Solutions](#)

Manage Expectations

13. Explain the business case for the project

Spend time building a clear business case to help users understand why they are being asked to support the implementation of a new ERP system. By providing employees with the “why” as well as the “what,” leadership will establish a more inclusive environment that will promote user adoption.

14. Promote patience and tolerance during the project

An ERP implementation project can be stressful for many of the individuals involved. Project teams must make difficult decisions that not everyone will agree with. Department managers will be facing additional stresses to get regular work done despite significant distractions. Users may be nervous about learning new systems or having their jobs become redundant. Everyone faces personal issues that may not be apparent. Patience and tolerance for missed deadlines or mistakes will go a long way in supporting user adoption.



BRIGHT IDEA

“I like to ask the user to open their old system and the new system, side by side. When they show me something they do in their old system, I show them how to do it in the new ERP system. It helps them learn to translate between the two. Seeing the similarities between the products makes the differences seem less overwhelming.”

-Katelyn Wood, [CAL Business Solutions](#)



15. Provide an overview walkthrough before training

Help users understand the big picture so they can understand how their role contributes to the process. Explain the ERP processes—including flow charts if appropriate—that span across the organization to provide context for users. In addition to helping with the initial adoption of the system, a broader perspective may help users see how they can extend the system to streamline operations in the future.

16. Address potential concerns of automation

Users will balk at learning a new system if they think it might replace their job or devalue their work. If automation will redefine their role, users need to understand precisely how they will fit in and what their responsibilities will be. Demonstrate how the new system will benefit them specifically and how their effective use of the application will make their work more productive and fulfilling.

17. Use terminology and examples that employees understand

During training sessions, use industry-specific terminology instead of generic examples included in vendor training data. If your organization uses the term “bill” instead of “invoice” users could be confused. Populate testing and training data with actual company data to help employees identify with the situations. When using actual product or customer names, lessons are much more likely to be understood.



“Train for the exceptions. Everyone can do a process in a textbook scenario. But what happens if something unusual comes up? Don’t just cover the process, brainstorm all the exceptions, and train for those. This will make users feel more confident.”

*-George Mackiewicz,
[CAL Business Solutions](#)*

Train Effectively

18. Offer a variety of training options and support

Support all learners by providing a variety of training options. Some people will prefer in-person, hands-on training and some will prefer to move at their own pace. Video recordings of live sessions support both paths and can provide a resource for new hires after implementation. Set up a Teams site that provides a central location for immediate and accurate answers and training-related discussions. Not only will it keep business moving during the cut-over, but it will also help end users feel supported as they work in the new system. Leverage superusers to help other employees in their business unit with on-the-job training and coaching. Superusers provide a familiar face to answer questions and help with troubleshooting.



BRIGHT IDEA

“Training needs to be done with your real data, in a test environment. Not in a demo system. Users will adopt the system faster when they can focus on the process and not on why the data is not relevant for them.”

**-George Mackiewicz,
CAL Business Solutions**

19. Take full advantage of video communication

As the number of people working remotely continues to climb, the value of video training and communication has increased. For most organizations, user testing and training sessions will include employees working from home. By hosting sessions in real time with a tool like Microsoft Teams, you'll enable two-way communication that can provide valuable visual feedback. Facial expressions and body language are key indicators of users' comprehension and adoption as they participate in training sessions.



When it comes to user adoption, experience counts!

Beware of ERP Partners that ask you boiler plate questions about your business processes. To be able to truly understand what you do, how you do it and how it will adapt to a new ERP system the Partners has to “go off the script” and ask the deeper questions. Those are questions that are based on experience and industry knowledge and are tailored specifically to your users

For most of your users, this will be the first time they have gone through an ERP software implementation. The best way to ensure success is to have an experienced ERP Partner by your side every step of the way - from planning to execution to training to ongoing support.

CAL Business Solutions has been helping companies, and users, to love their new ERP software since 1982.

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

[Contact CAL Business Solutions](#)



The first step is to schedule an ERP software discovery call. George Mackiewicz, the owner of CAL Business Solutions, will ask questions about your processes, systems, users and goals. Based on 30+ years of experience working with financial, distribution, manufacturing, project account and field service software George will help you determine if Acumatica or Microsoft Dynamics GP is a fit for your needs. This preliminary discussion can help you formulate your requirements, budget and timeline – even in the earliest stages of your ERP software research.

[Schedule a discovery call now](#)



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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