

eventura[®]



A GUIDE TO

Enterprise Resource Planning (ERP) Systems

Introduction

If you're reading this guide you are likely considering implementing Enterprise Resource Planning (ERP) software in your business. Or you have already made that decision and are now hungry for information to make your project a success.

Implementing an ERP system is a shrewd move. By doing so you can consolidate all of your key business processes in one place, streamline your operations, increase productivity and improve the accuracy of your data. You'll gain real-time insight into your business from which you can make strategic business decisions that will in turn accelerate growth.

ERP is a big topic, and with so much information out there, we decided to put together this ultimate guide to help people make sense of it all. The information in this guide comes from our experience in delivering game-changing business solutions to countless customers for two decades.

The technical implementation of ERP is just one part of the journey. Before this stage, it's important to really sit back and look at your business and its needs. What use is a fancy piece of software if it doesn't actually improve business processes and have tangible results?

Here at Eventura, we pride ourselves not only on our technical skills, but also on our ability to help you identify all of your requirements, and design a solution that works for your business and its people on every level.

We hope you find this guide helpful, and if you have any questions after reading it we would be more than happy to answer them. Let your ERP education begin!

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What is Enterprise Resource Planning?

Enterprise Resource Planning is a method of integrating and managing important parts of a business. It's done with ERP software applications, which are often central to a company's operations.

They are loaded with tools and features to implement resource planning, bringing together all the processes required to run the company into a single, centralised system.

ERP software systems can combine and manage things like:

- Finance
- Supply chain
- Planning
- Buying inventory
- Marketing
- Sales
- Projects
- Manufacturing
- Human resources

Virtually anything that is part of the running of a business can be covered by ERP software, making management of those processes easier and more efficient.

What is an ERP system?

An ERP system is a piece of advanced software that brings together all of a business's core processes in a single place. You can think of it like the brain of the business. It is filled with all the information and connections that are fundamental to the healthy operation of the body of the business.

Using a single system to manage all the data and processes involved in running the business keeps accuracy high and facilitates data-based decision making. In the past, such a system would have required a business to have some powerful hardware on site, but cloud computing has made ERP systems far more accessible to companies of all sizes.



Benefits of an ERP System

The benefits of ERP software are many. From increased security to greater efficiency and enhanced transparency throughout the organisation, you can capitalise on these benefits to gain a competitive edge and make your own operations happen more efficiently. Read on to learn some core benefits to utilising an ERP system in your organisation.

1. Standardised Data

The information from all departments is stored in one place. This makes it easier for employees in different departments to track down what they need. What's more, the critical data is all standardised into a consistent format as it is all in a single system. This makes the generation of reports and analytics simpler and more accurate, saving time and money.

2. Security

Data has become a big target for cybercriminals and an ERP system can help protect it. The data is all in one place with a single, comprehensive security system in place. Documents and spreadsheets are not passed around in emails and information is spread across various remote servers to avoid a single point of failure. There are also facilities to limit who can view and edit data with easy-to-implement permissions.

3. Improved Productivity

ERP systems provide multiple productivity benefits. Many basic tasks can be automated, freeing up employees to focus on work that is of more value. Many tasks can be completed faster with straightforward workflows and streamlined access to information. With everything accessible in one place, employees also will not need to spend time looking for individuals to answer questions and provide information.

4. Better Compliance

With accurate, up-to-date records, there will be less work required for compliance. With customisable reporting tools, compliance can be tracked and adjustments made accordingly. This improves your auditability as well. Many cloud

vendors such as NetSuite, who offer their ERP as Software-as-a-Service ensure the software is fully compliant, even across a wide range of countries with differing regulations and requirements. Whenever changes are made, the software will be updated to accommodate them and maintain full compliance.

5. Scalability

The best ERP systems allow you to employ the functionality you need while adding more capabilities in future as you grow. This makes them highly scalable, and you can add new users as teams expand. Even significant changes in your business can usually be accommodated by your existing ERP. Cloud-based systems are usually the most scalable, with additional resources available as required to keep everything running smoothly as business growth occurs.

6. Greater Visibility

It can be very useful for everyone to have visibility into various aspects of the organisation. Decision-makers can work faster and more efficiently with all the data they need. All teams can better understand what related departments and teams are doing to assist with their own work and collaboration can happen more smoothly and organically.

7. Cost-effectiveness

ERP systems are known to significantly lower costs in the long run for many businesses. The automation features alone can wipe out many operational or administrative costs. The insights the platforms provide can provide many other opportunities for cost savings, and improvements to planning mean issues like rushed orders, over-ordering or under-ordering are all but eliminated from the equation.

Although ERP implementation can seem scary due to some initial upfront costs, the longer-term cost savings outweigh this. And with increasingly affordable packages available from cloud ERP vendors, requiring little to no on-premise hardware or software, ERP is becoming more affordable than ever before.

8. Mobility

Employees are used to using mobile devices for many tasks and many modern ERP systems are mobile-friendly. Users will be able to pull up dashboards, reports and other systems they need remotely on any device, with many vendors even offering dedicated mobile apps. This is essential for some businesses with workers in the field who need to be able to access the systems wherever they are. This also facilitates working from home, and was quite simply a life-line to many businesses during the Covid-19 pandemic who's employees could still access the business software remotely.

9. Real-time Reporting

Reports are one of the primary focuses of ERP systems, with endless possibilities for customisation across different business operations. Whatever you need to measure, ERP systems can perform the calculations. This enables tracking of performance throughout the business and comparison of departments to understand strengths and weaknesses. The 'real-time' element means you always have access to the most up-to-date data to inform decision-making. Because reports are put together from one centralised database of information, they can be trusted fully, allowing real-time decisions to be made quickly and based on accurate information.

10. Organised Workflows

With the help of experts whilst implementing your ERP, you can find ways to complete tasks more efficiently within the new system. The way your company has always done things may not be the best way, and an ERP might be able to help reduce the number of steps in workflows to get things done more quickly. These new workflows can be standardised to eradicate discrepancies in the way things are done between different departments.

11. Enhanced Customer Service

You are competing with your competitors for a limited customer base. Providing a great customer experience is essential, and ERPs can help with this by putting data like customer contact details and order history in a single location. You will be able to provide streamlined

solutions and personalised experiences for your customers and also utilise inventory and order information to ensure customers sales orders are always fulfilled in full and on time.

12. Efficient Operations

ERP solutions touch every part of the business so everyone can experience improvements in the form of more automation and greater availability of information. Processes are completed quicker and operating costs can be decreased to boost profits. By identifying strengths and weaknesses and processing data instantly, an ERP system could save you huge amounts of money each year.

13. Flexibility

ERP platforms are designed for organisations of all shapes and sizes. Their flexibility means systems can be tailored to your specific needs, including accommodating uncommon metrics and unique processes. This flexibility also goes along with your business evolving over time – the system can still work for your business as it can be changed accordingly as change occurs within your organisation.

14. Collaboration

As we touched upon earlier, visibility into the workings of other teams and their data can make it far easier for collaboration to take place. Teams are no longer on separate islands using things that only they can access – they can share data with one another and communicate freely as required. Duplicate work can be eliminated and better ways to process daily tasks can be developed in tandem with one another.

15. Accurate Forecasting

Businesses need to have an idea of what's coming. Forecasting relies on historical data and other inputs to predict how demand, expenses, revenue and other figures will look in the future. Forecasting becomes more accurate with the use of an ERP system because of the access to detailed and broad information. With more accurate forecasts, you can prepare more effectively for what is going to happen and take steps to capitalise on future opportunities or mitigate future challenges.

How do I know if I need ERP software?

Businesses should be constantly evaluating the effectiveness of their existing systems and exploring the possibility of improving or replacing them. You know your business better than anyone, but if any of the following things sound familiar then ERP can help.

- Your business is starting to outgrow its existing systems and processes.
- You are struggling to get visibility of KPIs, so decision-making feels like guesswork.
- Different business functions are relying on different, disparate systems.
- You have an over-reliance on outdated database software and spreadsheets.
- Your business doesn't have the necessary flexibility to move into new markets.
- Your existing systems are costing you a lot of money to maintain and upgrade.
- Your current systems are holding you back from growing.
- You are struggling to meet the expectations of your customers.
- You are finding that the security of your systems is inadequate.
- Your systems are unable to leverage the latest technologies.

ERP Software Deployment Options (On-premise/Cloud/Hybrid)

ERP adoption experienced rapid growth through the 1990s and into the 21st century. But the costs of implementing these systems were soaring as businesses demanded more and more functionality.

This required a lot of hardware because systems had to be run through technology that was on-premise, meaning a server room with large machines was often required. Hardware and software licenses required capital investments and their value depreciated over time.

On-premise implementation is still a solid option, and if you have the capital then you get the

advantage of being able to customise the solution without limitation. You also get exclusive use of the system and resources.

The cloud has brought about subscription-based access to ERP systems. With cloud-based ERP, you get use of third-party servers to run your ERP systems in exchange for a monthly fee.

There are different packages that offer different levels of dedicated servers and bandwidth, so you can choose what works for you. Some businesses even opt for a hybrid ERP model, combining on-premise ERP with cloud ERP to get the best of both worlds.

What is the difference between cloud ERP and on-premise ERP?

The primary distinction is the way these two systems are deployed:

- On-premise software is installed on a company's own servers and computers.
- Cloud-based software, sometimes referred to as Software-as-a-Service (SaaS), is hosted remotely on the vendor's servers and accessed via a web browser.

A third and increasingly popular option is to implement a 'hybrid' deployment, wherein traditional on-premise ERP is hosted on third-party cloud platforms such as Microsoft Azure.

Pricing is another key difference between on-premise and cloud solutions.

Generally speaking, you will pay a monthly or annual subscription for a cloud solution, while on-premise deployments involve a one-time perpetual licence fee. In both cases, things like support, training and updates are paid for separately.

As such, on-premise systems are considered a capital expenditure due to larger upfront costs, while a cloud ERP solution is an operating expenditure.

Advantages/Disadvantages of On-Premise ERP

Generally speaking, on-premise ERP systems offer greater choice when it comes to customisation. You can modify the solution to meet your specific needs, and this is very important for many organisations. Niche industries with specialised processes often can't do without this feature.

Furthermore, on-premise ERPs give organisations greater control over their solution. This includes things like the security of their data, in particular to those companies who deal with sensitive data. If you choose the on-premise route, you must

take careful steps to implement effective cybersecurity measures to protect the ERPs most sensitive data against cybercriminals.

A substantial limitation of on-premise deployments is that mobile accessibility can be an issue. It often takes third-party clients to make it possible for a mobile device to communicate with on-premise software, and this can be a pain point for some. Also, on-premise ERP will often incur greater initial costs and the ongoing cost of maintenance.

Advantages/Disadvantages of Cloud-Based ERP

Cloud-based ERP solutions don't have the high upfront costs that are required for on-premise deployments. This makes them attractive for many smaller companies that simply don't have the budget to implement ERP on-site.

Cloud-based ERP offers the significant benefit of strict, robust security measures to keep your data safe. Buyers can seek a third-party security audit of the vendor they are considering before subscribing to a cloud ERP in order to establish the quality of their security.

Mobile accessibility is very easy with cloud systems, with native mobile apps often offered as

standard. However, this does have the inherent risk of security breaches as your employees' personal mobile devices may be compromised. Again it's important to have cybersecurity measures in place to negate these risks.

One disadvantage of cloud ERPs is that customisation opportunities are more restricted. You won't be able to tailor the system down to the finest detail, but if your needs are less specialised then the out-of-the-box capabilities you should be just fine. With many cloud-based ERPs, these specific business industries needs have already been considered, and additional modules are usually available for the software.

10 Reasons to Embrace Cloud-ERP

Cloud-based ERP solutions offer numerous benefits for businesses compared to on-site alternatives;

1. Improve your security.
2. Increase the mobility of your workforce.
3. Enhance operational flexibility.
4. Gain invaluable insights into your business.
5. Ensure regulatory compliance.
6. More reliable systems for your business.
7. Disaster recovery.
8. Access control.
9. Automatic updates.
10. Gain a competitive edge.

Below, we're going to take a look at these benefits in more detail, with the aim of providing a comprehensive guide to the benefits of cloud based ERP software.

1. Improve Your Security

Like most cloud services, cloud-based ERP solutions attracted considerable scepticism when they were first introduced. The cloud was a new concept that few business leaders fully grasped the potential of. The conventional wisdom at the time was that any data stored online would be vulnerable to theft via cyberattacks.

This way of thinking, coupled with the fact that these cloud-based services are maintained and overseen by third parties, not the businesses utilising them, has led many business leaders to dismiss cloud-based ERP solutions on security grounds.

However, with time, it is now clear that cloud service providers tend to offer more secure environments than on-premise alternatives. The reputation and future of their entire business depend on a robust approach to cyber security, so cloud ERP vendors are highly motivated to provide extremely trustworthy platforms to their clients.

2. Increase the Mobility of Your Workforce

Cloud-based enterprise software solutions have significantly improved mobility for many industries and businesses. Workers can access

data stored in the cloud whenever and wherever they need it, while taking advantage of bespoke portals that facilitate collaboration across different departments within the company.

Cloud-based ERP solutions enable employees to access vital customer and commercial data wherever they have an internet connection. With the appropriate data never more than a few taps of a smartphone screen away, workforces become more agile, improving overall workforce mobility.

As we've mentioned this became particularly apparent during the Covid-19 pandemic. Had such a pandemic hit two decades earlier, entire workforces would have become completely inactive. Thanks to cloud-based technology, businesses managed to facilitate working from home in many industries.

3. Enhance Operational Flexibility

The widespread adoption of digital technologies and IT systems has provided businesses with unprecedented efficiency gains. However, corporate IT systems are also notorious for the bottlenecks they can introduce in a company's workflow.

These problems often arise because inexperienced executives implement IT systems that are ill-suited for their business, creating friction that hampers operational efficiency. As a business grows, relatively minor issues can suddenly present huge logistical problems.

Cloud-based software solutions don't require businesses to invest in expensive physical infrastructure or the personnel required to oversee and maintain it. Once a company has found the right cloud ERP platform for its needs, it can easily scale up its capabilities as and when necessary.

The seamless transition from one subscription package to another means there's no downtime for upgrades and your entire workforce can operate more efficiently.

4. Gain Invaluable Insights Into Your Business

Like other cloud-based software solutions, cloud ERP platforms enable businesses to easily automate the collection and analysis of key performance metrics and other types of data. Many of the most widely-used cloud ERP services provide businesses with the ability to generate custom reports that collate and analyse specific data types.

Taking advantage of these reporting features enables businesses to gain invaluable insights into their customers and operations, allowing them to stay agile in a competitive space.

5. Ensure Regulatory Compliance

Any ERP system a business uses must adhere to the standards set out in frequently shifting regulatory frameworks. Keeping up with every change to the regulations and ensuring continued compliance is a major logistical challenge for many businesses, especially SMEs.

However, it is the vendors of cloud ERP systems who take on the responsibility of ensuring their platforms are compliant for all their users, no matter where they are located. Any changes to the ERP software necessitated by a change in the regulatory landscape will be made automatically via updates.

This means that with the right cloud-ERP, you will always be compliant.

6. More Reliable Systems for Your Business

Competition between cloud ERP vendors is fierce, which incentivises each provider to offer the best possible service. All the major players in the field advertise an uptime of 99.9% for their services, meaning customers shouldn't experience more than eight minutes of downtime in a single year.

Few businesses are in a position to maintain their on-site software to this standard, and doing so would incur a significant cost. Cloud ERP vendors invest heavily in maximising their service's reliability. By using cloud-based ERP software, you can benefit from this extra reliability.

7. Disaster Recovery

As part of their efforts to maximise reliability, cloud ERP vendors will also implement robust disaster recovery policies and procedures. These procedures are a failsafe against catastrophic data loss, which can result from fires, floods, thefts, or security breaches. Automatic backup routines should mean that even if an entire data centre is destroyed, a vendor should still be able to recover most or all of your lost data.

8. Access Control

A key feature among the most prominent cloud ERP providers is the ability to control who has access to what data and track precisely what data has been accessed and where it was accessed from. Of course, it's up to businesses to define their access control procedures and decide what data different users should have access to.

However, the tools that cloud ERP systems provide make it easy to implement whatever access control rules you see fit.

9. Automatic Updates

Outdated software can cause numerous issues for any company, but so can the procedures required to apply updates to existing software. With cloud-based software, there's no need to watch out for updates and apply them yourself; everything is handled by the vendor. In some companies, this represents a significant saving in time and money.

10. Gain a Competitive Edge

While most business leaders now accept the merits and benefits of cloud services, some holdouts still insist on sticking with the old-fashioned approach where everything needs to be kept local. But the reality is that businesses that utilise cloud technologies to meet their software needs have a significant competitive advantage over these stuck-in-the-mud rivals.

There are plenty of options for any business looking for a cloud ERP solution, but two of the most popular cloud ERP systems that deliver the benefits outlined above are NetSuite and Sage 200. Neither is inherently better than the other; which is right for your company depends on the size and nature of your business.

The ERP Selection Process Explained

So you've explored your options, looked at what's trending and evaluated the general needs of your business, and you've now made a decision: it's time to implement a new ERP system for your organisation. But the choice of which one to go with is not straightforward, as there is no single answer to which solution is the 'best'.

You need to choose between on-premise and SaaS, smaller brands or big-name vendors, industry-specific packages or more general solutions. It's little surprise that companies frequently become stuck at the stage of ERP system selection when faced with so many questions.

This is why it is very important to work with a good implementation partner. These companies have worked with many organisations to help translate business needs into a successful ERP deployment and many will have tried-and-tested processes for advising on systems that would be a good fit. As experts in this particular field, let us break down the ERP selection process to help you with finding the right ERP software for your needs.

Step 1: Discovery

Before you think about anything else, you have a single fundamental question to answer: what functional elements need to be accomplished by your new ERP system? Do you require a system that improves order processing? Are foreign currency exchange gains and losses a priority? What about the optimisation of various account functions?

As part of your due diligence, you should compose a list of all the functional possibilities that might be achievable with the ERP system of your dreams. This process needs to be carried out collaboratively with input from all the teams and departments that will be using the new system. As you discover more cross departmental functions, your list is likely to become more comprehensive, so devote the time needed to

ensure this process analyses all the right needs and involves everyone it should.

- Carry out interviews with teams and individuals.
- Review current accounting policies.
- Understand the current usage of reporting packages.
- Evaluate the data flows behind existing processes.
- Consider where you see your future and consider scalability requirements.

Understand that Discovery is the most fundamental step in the process of ERP selection. It is impossible to overstate the importance of ensuring you involve the right stakeholders at this point, as this will enable you to accurately identify the full range of needs your company has. The more thorough you are at this stage, the more boxes your ERP system will tick once it is deployed.

It's prudent at this stage to create an implementation team, consisting of various members of your organisation who will see the project through to the end.

Step 2: The Business Requirements Document

Once all the research for Step 1 has been carried out, you will have collected a vast amount of data across all business areas. Your next job is to compile it all into a business requirements document. It's important to include all the critical functions you determined in the previous step along with all the non-functional things you wish to achieve.

Have you done some research into vendors to assess how financially stable they are? Do you know which vendors are reputed to offer a high level of service? These considerations don't relate to the features and functions of the ERP, but their

relevance to your selection process is undeniable so it is wise to document them formally.

Once you have compiled the document, review it with key stakeholders to order each item in terms of priority. This step will be useful when you reach the point of comparing two or more packages that look relatively similar on the surface. It will enable you to identify functions that rank more highly in your list of priorities to differentiate between packages.

Step 3: The Initial Selection

After your internal needs are established, you are ready to compose a list of viable options. To do this, you will need to conduct quite a lot of exploratory research that may take a few weeks or more. During this time, it might be helpful to set up calls or in-person meetings to share information and explore the needs you established as high-priority.

Your list of ERP goals should be your compass here, and it will enable you to eliminate certain vendors that simply don't deliver what you need. The objective of Step 3 is to zero in on two or three vendors that you would like to explore in further detail.

Step 4: Product Demos

Once you have your sights on a handful of vendors, you are ready to take a deep dive with product demos. These demonstrations typically last 2-3 hours. In the lead-up to the demonstration, vendors commonly work with your company to highlight the business functions that you are most interested in exploring. For a demo to be well-run, it should be built around your business and the industry it operates in – this will give you a strong sense of what the software might be able to do for your daily operations.

Once the demo is over, discuss and assess with your team. Do you see any challenges the software might present? How well does it address your main priorities? Are there functions you would like to see again? In most cases, a second

demo is a good recommendation to ensure you can broach any lingering concerns or questions. When only two vendors are under consideration, a second demo can help bring some clarity.

Be sure to check references at this point. Most vendors will supply these for you, but you should also conduct some independent research.

Step 5: The Decision

When you reach this step, you deserve a pat on the back. You have done the hardest work in the ERP selection process and all that extensive research is now behind you.

Any lingering uncertainty can be helped by making up a scorecard for the team with line-itemed business requirements like the things listed in Step 2.

Have all the stakeholders give a rating for each line item then summarise the results to establish a winner.

The ERP Selection Process Summarised

- **Step 1: Discovery** – the fundamental step of taking an honest look at your business and identifying all the functionality you will need from a new ERP system.
- **Step 2: The Business Requirements Document** – compile all the information you gather from Step 1 into a formal document and include non-functional needs from the vendor.
- **Step 3: The Initial Selection** – explore the options for vendors and platforms and try to narrow it down to a list of two or three potential choices.
- **Step 4: Product Demos** – engage the vendors from your shortlist to demo their products for you then evaluate everything with your team.
- **Step 5: The Decision** – make your final selection. If necessary, work with your team to complete a scorecard that assesses how well the options meet your high-priority requirements.

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FREE NetSuite Demo

NetSuite is a powerful cloud-based business solution used globally by more than 32,000 organisations.

Its powerful Enterprise Resource Planning (ERP) and Customer Service Management (CRM) functionality allows businesses to automate their key processes, streamline their operations, increase efficiencies and provide real-time data driven insights from which strategic business decisions can be made. It features a sophisticated set of tools to run all aspects of their business including;

- Financials
- Supply Chain
- Project Accounting
- Inventory and Order Management
- Warehouse and Distribution Management
- Customer Relationship Management (CRM)
- Sales Force Automation
- B2B and B2C Ecommerce
- Professional Services Automation
- Analytics, Reporting and Business Intelligence
- Human Resources

BOOK A FREE DEMO

With NetSuite you can move away from disparate software and centralise your operations in one robust business solution, freeing up time to focus on growing your business.

“Engaging with Eventura to deliver our NetSuite ERP project is one of the best decisions we have ever made. We were able to quickly move from a costly, stalled and failing project, to a huge success.”

Sam Greaves, Managing Director – Cleenol

ORACLE NETSUITE
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Choosing the right ERP Implementation Partner

The implementation of an ERP solution is an undertaking of great complexity. Choosing the right software for you is important, but it is only half the challenge. If you want a successful project, you also need to work with a reliable implementation partner with the ability to deliver on your unique requirements and offer valuable leadership and guidance throughout the deployment of the new system.

Things to look for in your ideal implementation partner include the relevant skills and experience to be able to develop a comprehensive deployment plan, provide efficient project management and offer long-term support after the system has gone live.

So how do you discern between different implementation partners? To help your decision-making, we have compiled a brief guide that lays out the high-priority criteria that you should be considering when evaluating potential implementation partners.

1. Methodology

You need to have a good understanding of the methodology of potential ERP implementation partners. What this means is the framework by which they deliver your project – you could call it their ‘blueprint for success’.

It is essential that you take a good look at this and try to understand why they do what they do in their approach. A methodology for implementation should demonstrate how the partner has leveraged their own experience and knowledge to shape the methodology.

It should be more than a mere copy of the ERP vendor’s methodology or a generic set of steps that any ERP implementation partner could be using. At Eventura, we are committed to following our own exclusive methodology which we have cultivated and refined over years of experience in deploying numerous ERP deployments for different types for different businesses.

2. Experience

You want to work with an ERP implementation partner who understands exactly what you need from your ERP deployment. To achieve this, they will need a wealth of experience in implementing the solution you desire, and it can be even more helpful to find a partner with experience in successful ERP deployments within your sector/industry. You should ask for 2-3 project references to validate any claims about this with a prospective partner.

It is also important that your implementation partner understands key trends within your industry and follows best practice rules. A partner with a strong understanding of both your chosen ERP solution and your industry will be able to make accurate recommendations regarding the features of the software that will help your business achieve its objectives.

Furthermore, with existing knowledge of the challenges and regulations relevant to your industry, they will be quick to get to know your business and develop the right solution.

3. Technical Development

Most ERP systems will require some form of customisation to make it fit your requirements. Out-of-the-box solutions rarely meet every need a business has. With this in mind, it is important to choose an implementation partner with the technical ability to provide the customisations and integrations you need.

Eventura is a Managed IT Services business as well as NetSuite Solution Providers and Sage 200 Business Partners, so we have the skills and experience to identify and deliver the entire project including all necessary IT infrastructure.

4. Trust

Trust is an extremely important element of any partnership. You need a good fit between your team and the partner that assists with the

deployment of your new ERP system. These are lengthy projects so it's important to have a positive relationship with your ERP partner.

It takes time to build trust, but you can look for partners whose values are compatible with those of your organisation. Do they understand your business and goals? Do their expectations for the project align with yours? Are you confident the partner is committed to a successful project? You should be able to answer 'yes' to all of these questions and more.

5. Skill and Experience of Consultants

Try to find information on the exact consultants you will be working with then evaluate their skills and experience. View their profiles and ask to meet with them if possible. Is there a pool of consultants at your disposal? Sometimes the project throws up challenges that require a specific skill set. Look for evidence of upskilling and continuing professional development.

6. Approach to Project Management

The management of the implementation is crucial. How does the partner structure its project team? Will they communicate with you constantly throughout the project? This links to the methodology so you should know what to expect and when. Who is the point of contact if issues arise?

You need to be able to rely on your partner for a swift response when problems occur and a great project management approach will facilitate this.

7. Support and Training

ER implementation requires ongoing support once the system has gone live. Your implementation partner should accommodate this by providing long-term support as required. A key part of the implementation plan should be training, and you should choose how this looks for you.

Do you want ongoing training for staff in their specific areas of the ERP solution or do you want to train 'super-users' who can go on to deliver

their knowledge in-house? A good partner will go out of their way to ensure a smooth and successful transition.

8. Relationship with the ERP Vendor

An ERP implementation partner should have a good relationship with the ERP vendor they represent. They are an intermediary between you and the vendor and, if they have good lines of communication with them, they can easily raise requests for support or changes that require the input of the vendor.

Look for the level of partner certification and any awards the implementation partner has won as recognition of their relationship with the vendor.

9. Trust Your Gut

All of the previous points are extremely important and warrant huge consideration, however you also need to remember that you might be working with your ERP implementation partner closely for a long period of time. It's important to trust your gut and work with a company who you get a good feeling from.

A successful ERP implementation isn't just reliant on the technical stuff. It's also reliant on forging a strong relationship with your implementation partner, so choosing someone you think you will genuinely work well with and who you trust is paramount.

The list outlined above is not exhaustive, but it provides the main points you need to consider when making a decision about which ERP implementation partner to go with. Choosing the right ERP implementation partner is crucial to the success of the deployment. You need a partner that brings the right team, skill, knowledge, experienced and shared goals to ensure you have a solid foundation for success.

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- In the last 12 months, 39% of UK businesses identified and reported a cyber attack.
- Of these businesses, 31% estimate that they were attacked at least once a week.
- In 2021, cyber crime cost small businesses in the UK an average of £4200, and £19,400 for medium to large businesses.
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Building the Perfect ERP Implementation Team

Because ERP software touches so many facets of a business, it can be challenging to implement one. An implementation will often take several months, or even longer for larger, more complex businesses.

Where mistakes occur in the planning or implementation phases, such as failure to clearly define requirements or goals, further delays can be encountered. To ensure an ERP implementation goes as smoothly as possible, a solid implementation team is critical. Here are some things you should know before you begin.

ERP Implementation Team Defined

Big projects require a team that is skilled and dedicated, and this applies to implementing a new ERP system. Your ERP implementation plan should define a team of key members, with representatives of different areas of the organisation at various levels of authority.

This means there should be project managers, executives, end users who the implementation affects, experts from different business facets and IT staff with the skills to customise or implement the new system.

Each of these people will provide important insights into the way people work, sponsorship and general practical support.

The Role of the ERP Implementation Team

As a unit, the ERP implementation team takes responsibility for following best practices throughout the implementation, ensuring the success of the project to get the ERP solution operating as required.

The team takes centre stage from the outset of the project, helping identify a solution that matches the goals of the organisation and provides the capabilities and tools needed. The team maps out these requirements for the ERP system, assigning key milestones and determining precisely how specific business processes will be supported, as well as testing the new system before it is launched.

The full team must be assembled at the very beginning of the project. This way, all stakeholders will have the opportunity to make themselves heard and play a role in facilitating successful implementation at every stage.

The Key Members and Roles Within the ERP Implementation Team

It is essential to include the most appropriate people in the ERP implementation team in order for the project to succeed. Each team member plays a different role with different responsibilities, and this should revolve around their skills and expertise as well as their availability to devote time to the project.

There should be a clear definition of these responsibilities to ensure everyone knows exactly what they are doing and avoid gaps in responsibilities from occurring.

The Project Manager

An ERP implementation requires a point person – someone who ensures timelines are adhered to and that the project does not exceed its planned scope. This is the role of the project manager, who must work to keep the project on track and communicate with the executive sponsor and other team members about progress and challenges that arise.

There are several duties for the project manager to undertake. They must take point in identifying several ERP vendors and arranging demos for the team, as well as organising the eventual evaluation.

They also map out the steps of implementation, including coordinating the system to business processes and carrying out tests. At every stage, the project manager keeps the project plan updated and keeps the executive sponsor connected to the team members.

The Executive Sponsor

ERP implementation can impact virtually every arm of the organisation, so there needs to be someone at the very top to champion and drive the implementation strategy.

This is the executive sponsor, and they must assess risks and create action plans, frequently operating as cheerleaders for the company and as the project's internal face. Throughout implementation, the executive sponsor takes updates from the project manager and maintains communication with core team members.

Financial decisions about the projects are typically made by the executive sponsor. This is informed by input from the implementation team as well as a focus on aligning with the customer's business needs. Decisions may include things like increasing the project budget, identifying the processes to be automated and deciding whether personnel need to be added or removed.

Core Cross-functional Team Members

A good team must have technical experts from various departments of the business, such as IT, finance and manufacturing (if applicable). These team members must assist in directing software configuration and design to support key business processes, and also highlight opportunities to leverage the new system's capabilities to bring about improvements.

They must educate themselves in some of the technical aspects of the ERP to gain an understanding of what it can do for certain business needs and technical issues.

If you do not use the services team from the ERP vendor, or a third-party partner, to lead the implementation, an IT team representative will speak for the internal IT team that gets the system live. This team will be pivotal for configuring the software to the business needs, whether through an on-premises solution or a cloud-based ERP.

The IT team will also have to install and maintain the hardware and software if an on-premises solution is selected.

End-users

These are sometimes referred to as super users. They are in the ERP implementation team to raise concerns from their departments about the setup of the system. They often encourage adoption within their departments, giving answers to non-technical questions about how the system will work once it goes live.

End users need leadership skills to be champions of the project, and their technical skills must be pretty good. They need to be effective communicators to ensure departmental concerns are raised and also to help other users comprehend the new system.

Report Writer

One of the best things about ERP systems is their ability to analyse and report on different types of business data. An ERP implementation team

often includes a report writer to customise the platform's reports to reflect the relevant business needs. This individual must have an in-depth knowledge of the reporting tools of the ERP system as well as the data it stores.

The report writer is responsible for analysing the existing reporting processes of the organisation and developing ways to use the new solution to make improvements. Their involvement may continue after the system goes live to modify reports and create new ones.

Implementation Partner

Companies often work with an implementation partner to help with the technical work in deploying a new system. They may also take on some responsibilities within the ERP implementation team. For example, an implementation partner might serve as a project manager and help coordinate technical aspects of customising and installing the system.

Generally, implementation partners do not cover all roles in the implementation team. But they can spearhead the work, ensuring adherence to timeline and maximum efficiency throughout the challenging technical work, bringing specialist expertise to the table.

Recap - Building the Perfect ERP Implementation Team

To recap, here are 5 things you need to think about to ensure success when building your ERP implementation team:

1. Obtain executive sponsorship for a top-level champion to rally the entire organisation behind the implementation.
2. Include cross-functional users and end users throughout the project to ensure concerns from all departments are addressed swiftly.
3. Select team members with time to devote to the implementation. The project can take up a lot of the team members' time, so they may need to delegate other duties temporarily.
4. Choose team members who have the right skill sets rather than their seniority. If a more junior employee possesses the right capabilities, they make a more meaningful contribution than a more senior employee who lacks those skills.
5. Define ERP implementation roles clearly and plainly from the outset. This information is crucial to choosing the right team members from your employees.

ERP Implementation Steps

The implementation of an ERP system involves the planning, configuring and deployment of ERP software, and it usually takes a few months or more if everything goes to plan. There are various complexities in integrating and automating many different business functions, particularly for larger organisations.

The implementation process is very important in order to get the most out of an ERP platform. Organisations must determine their requirements and how processes can be redesigned to leverage the system's capabilities.

There must be rigorous testing and lots of fine-tuning to make sure everything works just right. There are many steps to a successful implementation, and it takes structure and planning to make it work.

What are some common reasons for ERP implementation failure?

ERP implementations don't always go according to plan. Here are the most common reasons for failure when attempting to introduce an ERP platform into an organisation:

- Poor execution of change of management or ownership.
- The end product fails to yield the desired benefits.
- Business goals shift during the ongoing implementation project.
- Planning and project management are not up to standard.
- There are delays in deliveries from vendors.

The best way to avoid these issues is to work with the right ERP system and implementation partner. But this is just part of the battle – every ERP project is different, so a pre-planned, comprehensive approach is needed from the outset. Here are the steps to a successful ERP implementation when it is done the right way.

1. Discovery and Planning

This is the foundation of any ERP project. It involves conducting research to select a system, then establishing a project team and laying down the details of the system requirements.

The project team, which may involve an implementation partner, handles various roles relating to the implementation. They will create the project plan and identify target dates, ensure adequate allocation of resources, make decisions regarding design and handle the day-to-day project management.

Senior management needs to be involved in the ERP project team to ensure the necessary resources are available and the key decision-makers are available to implement change. It is also common to partner with a consultant or ERP implementation partner to access their expertise and experience in the designing and configuration of the system.

The team should also include an executive sponsor, a project manager and representatives from all departments that will utilise the system. A member of IT is always a useful member to have as well.

The team must set about identifying issues that need to be overcome by the ERP system. If an ERP business case exists, this can be harnessed to execute a more direct analysis of existing workflows and focus on the development of a new system. During this phase, an ERP system may be selected and acquired. The question of cloud versus on-premises is key.

2. Design

This step is built upon the detailed requirements identified in the discovery and planning phase. The ERP system must be designed to address the efficiency issues highlighted among existing workflows, developing new workflows that leverage the capabilities of the ERP system.

Users should be involved in the design phase as their understanding of current business

processes is likely to be the strongest. This will also help them to embrace the new system when it arrives.

Process intricacies can be identified via gap analysis, wherein opportunities to customise the ERP for your specific needs can be highlighted. It may also be necessary to make changes to operations so that they align more closely with the ERP functionality. Identified gaps can be presented to the implementation partner for assistance in finding potential solutions.

3. Development

With the clear design at hand, it's time to move on to the development process. This involves configuring the software and making custom modifications, where necessary, to support your processes.

It may also be necessary to develop integrations with existing business applications that are not going to be replaced by the ERP. For an on-premises ERP solution, there will be hardware and software required to make this happen.

Alongside software development, the team should be working on developing training materials so that employees can transition smoothly to the new system. This is also the time to plan for data migration – this can become complex as it typically involves the extraction, transformation and loading of data from multiple systems based on different formats where duplicate and inconsistent information is common.

The project team must determine the data to be migrated during this phase – much of the historical data could likely be unnecessary. Data will also need to be cleaned up and reformatted for the new system.

4. Testing

Much of the testing will occur during the development phase. For example, specific features and modules may be tested in order to identify where fixes and adjustments are needed before retesting. Alternatively, one ERP module may be tested while another is being developed.

Basic functions should undergo initial testing before a more rigorous testing process of the system as a whole is undertaken. Some employees could be pulled in to see how the system works with their day-to-day activities. All migrated data should be tested thoroughly and introductory end-user training can be initiated.

Most vendors offer pre- and post-deployment resources for user training. But this vendor support should be supplemented by the training materials created during the development phase, as these cater to the daily responsibilities of your end-users.

5. Deployment

This is the point at which the system goes live. Potential issues are likely as there will be many moving parts and employees will be getting used to the new system.

The project team should be on hand to answer queries and assist users as they engage with the new system. Your implementation partner is usually available for troubleshooting as required and it may take a little time before the productivity gains of the new system are realised.

Some of the data migration will need to happen immediately before going live. You must also consider whether you want to deploy the entire ERP at once or focus first on high-priority modules before adding others further down the line. You may also wish to continue running older systems alongside the new ERP for a while for risk mitigation – this is up to you.

6. Support and Updates

Once live, the ERP implementation must be nurtured and maintained to keep achieving business benefits. The project team may retain responsibility, but their focus will not be on listening to feedback and making adjustments where required. It is likely that some additional configuration and development will be needed.

For on-premises ERP systems, periodic software updates will need to be installed manually. Cloud-based ERP systems usually update automatically as they are offered as Software-a-a-Service.

ERP Data Migration Explained

Data migration can be challenging, but it is a crucial component of implementing an Enterprise Resource Planning (ERP) system. Every ERP solution is built upon the foundation of a shared database that gives all employees throughout the organisation access to a centralised, consistent set of information. When you implement a new ERP system, you must move all the key data stored on your old systems into the new database.

This process of data migration can often prove complex and time-consuming. This is why careful planning is of the utmost importance. If you underestimate the time and effort this process takes, the implementation of the ERP platform may be delayed. The accuracy of the transferred data is critical since many aspects of your business are going to rely on the database – this is not something you can afford to get wrong.

Before an ERP is adopted, some departments may rely on systems that are specifically designed to support their functions alone. This often consists of things like standalone human resources or accounting applications.

Other groups within the organisation may rely on broader tools like spreadsheets. When migrating the data from these disparate departments, a methodical approach must be deployed. Before importing it into the new database, the data from these applications must be:

- Inspected
- Extracted
- Cleansed
- Transformed

Key Points to Remember When Migrating Data

The challenges of data migration include time, cost, issues with data redundancy and integrity, potential regulatory concerns and stakeholder support.

Successful ERP implementation hinges on the quality of your data migration strategy. You should have a dedicated team to analyse data, perform the migration and evaluate the results. Best practices for ERP integration include starting early on the migration process to avoid delays in the ERP deployment. The data migration is also an opportunity to discover and remove obsolete historical data.

Why is data migration so important when implementing an ERP system?

The data migration process is absolutely fundamental to the data in the new ERP platform being complete and accurate. Many people throughout your organisation will be relying on this historical data, so accuracy is paramount. It's also especially important to remain compliant with regards to retention of records.

Well-executed data migration can also ensure the wider ERP implementation project remains on budget and on schedule. As you carry it out, there will be opportunities to remove obsolete data that is no longer needed from the older systems. If you under-prioritise data migration, you are likely to encounter issues like inaccurate or duplicate data and your go-live data might be delayed.

Common Challenges with Data Migration

There are many challenges that can arise during ERP data migration:

1. Cost

The cost associated with extracting, cleaning and restructuring data can end up making up a substantial part of the budget for implementing the ERP. Even if the process is relatively simple, like moving data from an older ERP to a new one, the data migration process can add 10-15% to the overall cost of the new system.

2. Integrity of data and data redundancy

Different departments may have their own copies of the same information about certain products or customers. This doesn't necessarily mean their data is identical, however, since different departments may use different criteria for categorising data.

For example, you may find that names and addresses are stored in different formats, or there might be different addresses for the same customer. Simply importing every record from every departmental system into the database is likely to lead to data duplication and inaccuracies.

3. Regulatory concerns

There are many regional and industry-specific regulations that impact the way organisations store and use data. When making data transfers, compliance with these regulations is essential. For example, legislation like GDPR requires organisations to retain the ability to delete all records of a customer's personal data on request.

4. Stakeholder buy-in

Company managers have a number of priorities, and ERP data migration may struggle to make the list. But buy-in from stakeholders is important for the avoidance of internal conflict. Management backing can be pivotal in ensuring all departments cooperate to produce a consistent set of data when they have been accustomed to entering data in different ways.

4 Steps to Build Your ERP Data Migration Strategy

1. Assign a migration team

Put a team together that will be responsible for making decisions about the data to be transferred and the ways to clean it up. This will be part of your overall ERP implementation team and should include members of different business groups whose insights will help understand how those groups use data.

2. Analyse and map your data

Data in each of the source systems should be examined to identify inconsistencies and redundancies. The team must decide on resolutions for these issues before the data migration takes place, and you will need to map out the ERP database for each phase of the implementation so automation tools can handle the data import.

3. Decide what will be migrated

Identify obsolete data that does not need to be in the new system. If you wish, you can store it offline in a separate system (depending on your data retention policies).

4. Migrate and test

Modern ERP systems often include automation tools for data import. You may need to rationalise the data first and perhaps convert it into a form that the ERP can recognise. Once the migration is complete, run tests for every group in the organisation before going live.

Best Practices for Data Migration

- Data migration should be a priority. It's a lot of work and, if it's done wrong, the whole ERP implementation can be delayed.
- Think about how the data will be used by the business. This enables you to map it to the structure of the ERP database and establish rules for translating that data during migration. You want this data to enable the ERP to give you useful insights and analytics, so it needs to work for the ERP's database.
- Think about data governance responsibility. Who owns which data? Assign roles within the team and pay close attention to compliance regulations that affect your business.
- Be selective with the data as not all historical data needs to be immediately accessible. Optimise the process and your new systems by weeding out obsolete data.

How long does ERP implementation take?

There is no single answer to this question. A basic ERP implementation could go live within a few months, while a more complex one could span a year or more. On average, you can expect the process to take around four to six months.

It's prudent to revisit the common reasons for ERP implementation failure earlier in this document. By committing to a project whole-heartedly, in partnership with a reputable ERP implementation partner, you should be able to reduce the implementation lead-time and avoid any pitfalls.

Am I ready for ERP implementation?

Remember that ERP implementation is a significant undertaking. The importance of planning cannot be overstated, so you must not rush into configuring and customising your system. You must also be prepared for training staff and have people on hand to offer support.

The implementation of an ERP is a big step, but it's one that could quite simply revolutionise your

business. You can wave goodbye to disparate systems and manual processes, and say hello to new efficiencies and greater visibility across your business.

If you are considering ERP implementation but the associated costs are somewhat off putting, it's definitely worth considering the potential benefits on offer by performing a cost-benefit analysis.

How do I carry out an ERP cost benefit analysis?

If you're considering investing in an ERP system for your business, a cost-benefit analysis can be a good starting point for your thinking. When conducted properly, it will prevent you from obtaining a system that costs more money than it earns.

When you enter into the analysis, you will find that it's as much about the journey through the process as it is about the document you produce at the end.

The decision of whether to bring in an ERP to replace dated legacy systems is a common quandary. Technology advances, competition increases and consumers begin to expect a certain standard of service. But how much will it cost you to keep on top of those concerns? Before you let the numbers scare you off, consider the following.

Myths Around Software Selection

Before we start, here's a quick reality check to give you some perspective:

Myth 1: The IT department should manage the software selection process. The ERP implementation team should also include stakeholders and people who will use the new software daily.

Myth 2: Cost is everything. The best ERP system will meet your requirements right now and in the future – this may not be the cheapest option, but ROI is about value over time.

Myth 3: Selection should be left to consultants. Your internal teams are the ones who need to use the software and their knowledge of the company will be invaluable in finding the right software.

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Sage 200 is a piece of Enterprise Resource Planning (ERP) software used by thousands of businesses around the world.

It centralises key business processes, allowing them to be managed with greater efficiency through increased automation. All business data is stored in one central database, increasing accuracy and allowing businesses to carry out real-time reporting and analysis and make strategic data-driven decisions. The software is offered as a cloud-based, on-premise or hybrid solution. With Sage 200 you can manage;

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“*Eventura are customer focused and informative; they listened to our challenges before offering a solution that delivered to our needs.*”

Martin McQuaid, Director, DH Whelton

Sage Business Partner



Myth 4: More capabilities equals better software. You may simply need to streamline operations rather than be dazzled by the most fully-featured software. Focus on what your business actually needs.

Myth 5: Research is finished once a vendor is contacted. The software you choose may not actually be right once you get down to the nitty-gritty. Failed ERP implementations are disturbingly common so keep an open mind.

What are the costs associated with implementing an ERP system?

1. The Acquisition Price

This is what you pay to purchase licences to use the system – it may be a single upfront cost or a regular monthly fee.

2. Business Analysis Resources

ERP vendors know their systems but not your business. You will need to document the base processes and requirements of your business and this takes analytical people with the skills and experience to build a foundation for your evaluation and selection process.

3. Data Analysis

This will require an individual or team that can supply the new system with good, clean data that fits the formats and standards of the new system.

4. Maintenance

If you subscribe to a cloud-based system (SaaS) then updates and support are typically included in the monthly fee. But if you purchase a perpetual licence, you will need to pay for ongoing maintenance.

5. Infrastructure

If your system is not a SaaS one, you will need to review the server capacity you have and consider whether it needs upgrading or replacing. You also need to think about desktop and mobile devices, shop floor consoles, networking and more – everything must be ready to meet your needs with the new system.

6. Customisation

No two ERP deployments are the same because the system settings will be customised to meet the specific needs of the organisation in question. This can be time-consuming and laborious, requiring the input of consultants and your own members of staff who understand the way your company operates.

7. Testing

New systems must be tested comprehensively once installed. The supplier can handle technical testing but experienced staff will be needed to do the more functional testing, and it is likely things will need to be tweaked.

8. Training

Your teams need to be trained to use the new system and this may require specialist resources.

9. Change Management

A new ERP project is an exercise in change management and some people may need to change roles. You might even need to bring in some new employees in some cases.

10. Other Costs

These can include:

- Transition costs like retiring old systems and recycling old hardware.
- You may need to commit to a maintenance contract.
- You should make allowances for other unforeseen costs.

It is down to you to quantify all of the above and calculate the total monthly costs for the short and long term.

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Start your digital transformation today

We want to be your trusted technical partner, working together to achieve success with a tailored business system, improved processes and a robust and reliable IT infrastructure.

If you think your systems and software are slowing you down and holding you back, it's wise to get them professionally audited. Issues can be identified and then rectified, giving you the tools and technology you need to grow your business.

If any of the below apply to your business then please get in touch, we can help.

- Are your systems running increasingly slower and freezing more often?
- Could productivity be increased if everything ran faster and more smoothly?
- Are your employees becoming increasingly frustrated with unreliable systems?
- Does your business have new requirements that your current systems can't handle?
- Has connectivity become a problem due to increased remote working or expansion?
- Are you worried about how secure your systems really are?

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“The most important thing we've seen is an increase in the general efficiency of the whole business. It's leaner and fitter than it ever was before.” **Matthew Brown**, Director, TV & Video Direct

Final Thoughts

If you're reading this you're obviously serious about learning everything there is to know about ERP. Trust us, that's a good thing! ERP implementation is a significant undertaking, but the benefits on offer make it all worthwhile. And with the right research, backing from your organisation and a solid implementation partner, there is no reason why your ERP project can't be a massive success.

Changing business systems and software can be a daunting prospect. All too often businesses

remain on disparate legacy systems because they're familiar, despite the fact they're restricting growth and becoming increasingly unreliable.

ERP offers a real-world solution to this problem. Yes an ERP project is a big undertaking, and shouldn't be entered into half-heartedly or without extensive research. But the reward is quite simply massive. By implementing ERP, you're giving your business and your people the tools they need to thrive.

Why choose Eventura for your ERP project?

Eventura has been providing robust business solutions to countless organizations for over two decades. We are ERP experts and can identify all of your business needs, and deliver a comprehensive ERP solution that works for you.

As Sage 200 Partners and NetSuite Solution Providers, we can help you identify which solution will fit your business needs the best. Our expert team of business analysts, developers,

consultants, technicians and support staff can guide you through your entire project, from initial scoping through to implementation and on-going support.

We're also managed IT service providers and Microsoft Gold Partners, meaning we can help you identify your entire IT infrastructure requirements from day one. If you would like to speak to one of our ERP experts please feel free to get in touch.



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