

ERP Projects in the Post COVID world - Part 3

Optimising remote workshop productivity

Those of you who read my first two posts will know that I believe that once the worst of the COVID-19 pandemic has passed, we will be doing a lot more ERP implementation work remotely. In that post I also proposed benefits to a project being carried out remotely. By way of re-cap, these include:

- Enforced improvement in documentation of discussions and decisions.
- Accelerated roll-out timescales, through sharing of experienced resources across sites, allowing big-bang go-lives to be supported more easily by a central project team.
- Greater parallel development of processes at multiple sites by holding global workshops.
- Easier involvement of ERP vendor resources in project activities

However, carrying out an ERP implementation remotely presents many challenges. Some of these are new, and others are simply amplification of the usual ERP project risks.

New issues include:

- Getting a clear understanding of current business operations (especially Manufacturing and Warehouse processes) without 'walking the floor'.
- Demonstrating proposed new ways of working
- Building rapport and trust with managers, key-users and end-users.

Amplified Issues could include:

- Lack of time commitment from key business personnel
- Management Buy-in and Commitment
- Inadequate user training



Clearly, to gain the benefits I listed above, we will need to develop new working approaches and modified implementation methodologies which remove or mitigate these risks and issues, and in the previous article, I proposed some tools and approaches which the remote functional consultant can use to understand clearly how things are currently done in an organisation. In this instalment, I will discuss how – with correct preparation and follow-up - process workshops can be run remotely, whilst still achieving all their desired objectives.

The objectives for an ERP process workshop are:

1. To understand the inputs, outputs and variables of a business process.
2. To ensure that the business users are fully aware of the capabilities of the ERP system and the options available within that functional area. The workshops are a key part of the gradual knowledge and confidence-building process of the project.
3. To understand the impact which the process has on other areas of the business and the other processes that it in turn depends upon.

4. To achieve a consensus on how the process will be operated in the future using the tools offered by the new ERP.
5. To agree the required future actions relating to system configuration, data preparation, process testing and documentation relating to the process area.

To ensure that these objectives can be met when the workshop itself is held remotely, **AbsoluteERP** propose as part of its new **Virtual Workshop Methodology** the following key stages for a workshop:

1. **Preparation** for the virtual workshops by the business (discussed in an earlier part of this article),
 - Creation of extended process videos
 - Mapping and diagramming of the machines and services
 - Updating of Process flowcharts
 - Collation of 'pain points' for the existing process and system
2. **Preparation** for the virtual workshops by the functional consultant
 - Prepare a set of questions to unearth greater detail about why a certain activity is seen taking place.
 - Draft a 'straw-man' proposal for the to-be process in each workshop area to stimulate discussion.
3. **Hold the workshop** via an online meeting platform
 - Using Teams or Zoom to run the meeting allows business users from multiple sites to contribute equally (nobody is the 'odd one out')
 - The recording feature should be used at all times as this reduces the need for real-time notetaking by the consultant and increases accountability.
 - The consultant presents the 'Strawman' process proposal and invites the business users to provide initial questions and comments.
 - The consultant demonstrates the proposed process using realistic data and scenarios where possible.
 - Encourage at least one of the business users to carry out the process with scenarios of their choosing.
 - Pose questions about observations from the process videos and flowcharts provided and encourage discussion of the responses received.
 - Agree the required follow-up actions.
4. **Carry out follow-up** activities. These will normally include:
 - The consultant reviewing the recording and making further notes about the process and the questions and comments from the users
 - Further testing by the business users.
 - Any un-resolved questions should be investigated and answered by either the consultant or the business users.
 - The business users should be encouraged to discuss the process with their peers and feedback additional responses and questions to the consultant.

It should be remembered that each workshop is usually only one in a sequence, so if several iterations of the process design are required, in order to cover all the possible scenarios, and to gain the full confidence of the business users, that is fine.

In my next post, I will deal with how to communicate the proposed processes to senior management and other key stakeholders, who are not directly involved in the virtual workshops.

In the meantime, if you are interested in discussing this approach further, please e-mail us at info@absoluteerp.com.