

September 6, 2023

# ERP Journey: ERP Implementation & Optimization



MEET

# Our Presenters



**Lindy Antonelli**

Partner, Technology Consulting  
Industry Experience: 30 years



**Nicole Ripley**

Director, Consulting Enablement  
Industry Experience: 10 years



**Clint Whelan**

Manager, Consulting Enablement  
Industry Experience: 9 years



**Brandt Kucharski**

CAO, Ethos  
Former CAO, Grubhub  
Industry Experience: 20 years



KNOWLEDGE

# Learning Objectives



**Discuss the critical steps and strategies for a successful ERP implementation**



**Explain the importance of proper planning, including project management and resource allocation**



**Highlight the significance of change management and employee training during the implementation process**

# Who is Armanino?





WHERE WE ARE

# Our Locations

2500+ Employees | 18<sup>th</sup> Largest CPA & Consulting Firm

**CALIFORNIA**

- San Ramon
- San Jose
- San Francisco
- Los Angeles (2)
- Irvine
- El Segundo
- Woodland Hills
- San Luis Obispo
- Torrance

**WASHINGTON**

- Bellevue

**COLORADO**

- Denver

**IDAHO**

- Boise

**TENNESSEE**

- Nashville

**TEXAS**

- Austin (2)
- Dallas

**ILLINOIS**

- Chicago
- Naperville

**MISSOURI**

- St. Louis
- St. Charles

**PENNSYLVANIA**

- Philadelphia
- Scranton

**NEW YORK**

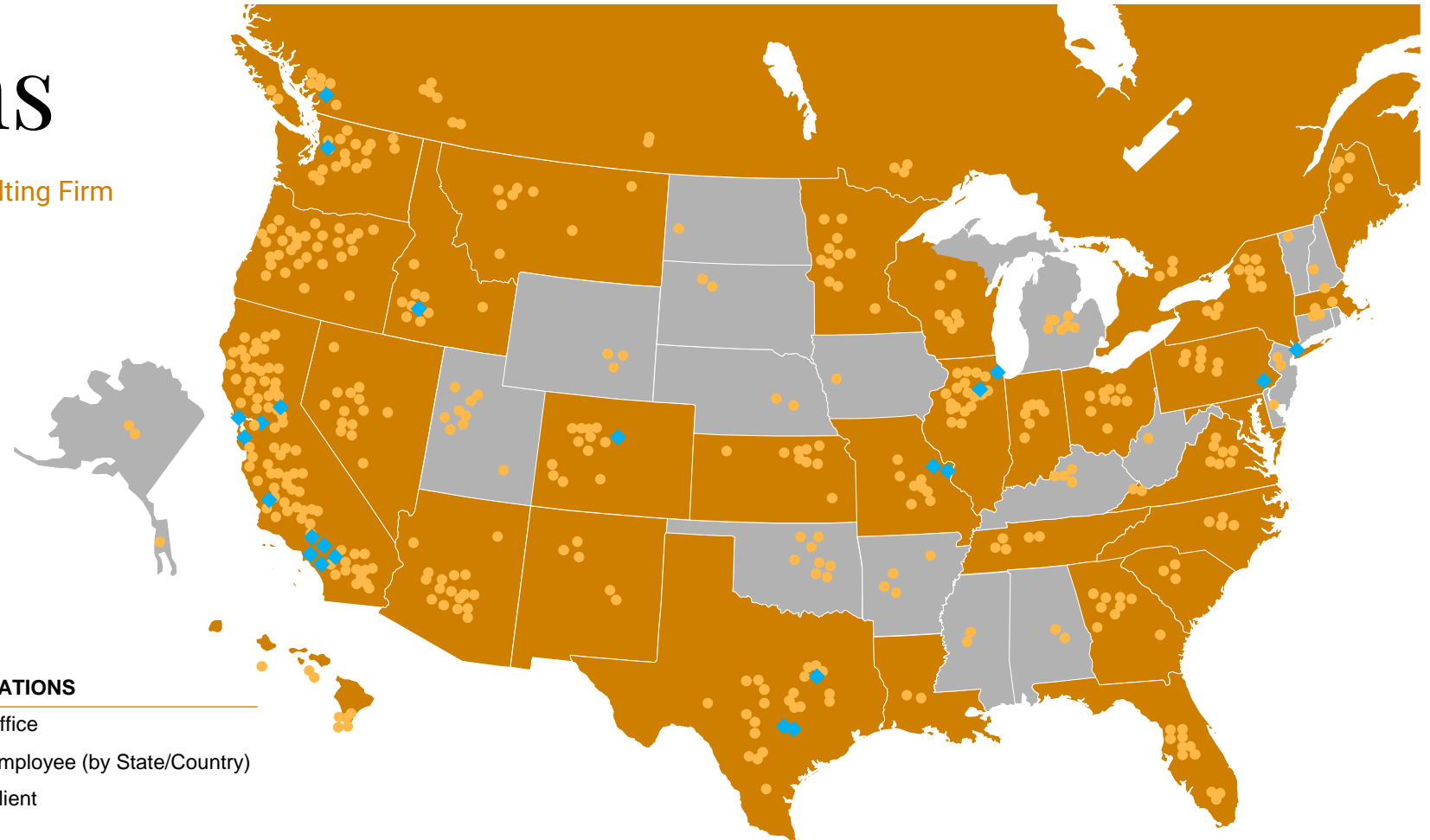
- New York City

**CANADA**

- Vancouver

**LOCATIONS**

- ◆ Office
- Employee (by State/Country)
- Client





ARMANINO

# Firm Overview

*Count on Armanino to think strategically and provide sound insights that lead to positive action. We address not only your compliance issues, but your underlying business challenges.*

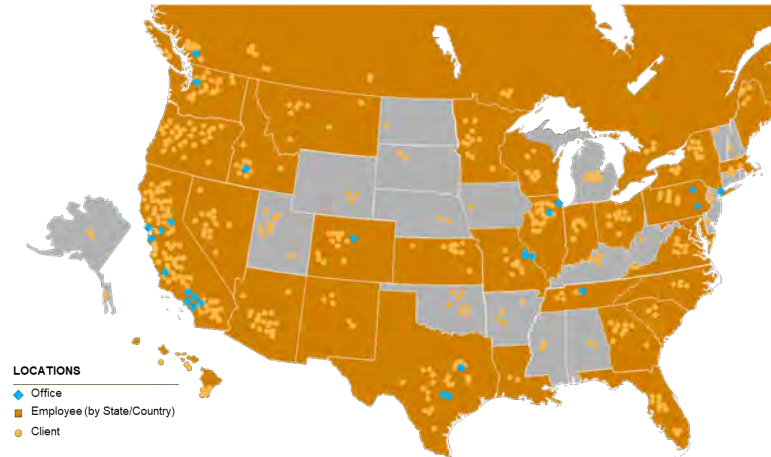
## Purpose

To be the **most innovative** and **entrepreneurial firm** that makes a **positive impact** on the lives of **our clients, people and our communities.**

## Snapshot

2500+ Employees  
 Team Members in 23 States  
 18th Largest CPA & Consulting  
 Largest Niche: Technology

## Locations



- CALIFORNIA**
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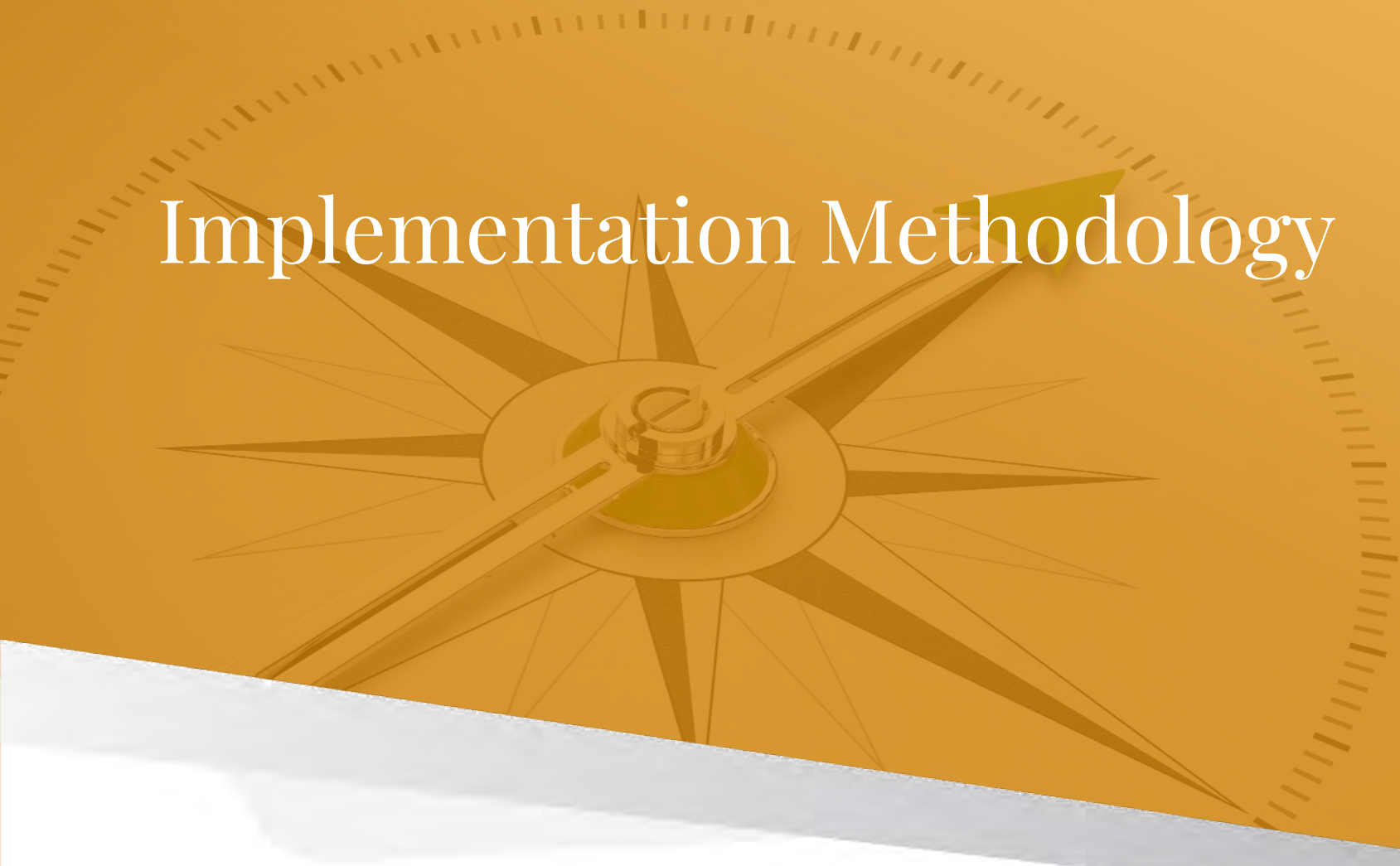
### AFFILIATE COMPANY



### RECOGNITION & AWARDS



# Implementation Methodology

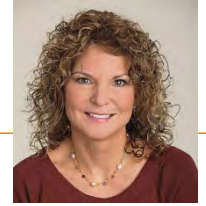




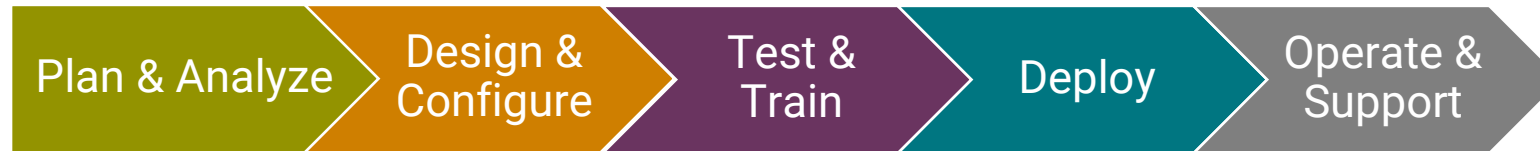
# Client Roles & Responsibilities

| Role                               | Responsibility   |
|------------------------------------|--|
| Executive Sponsor                  | Responsible for attending critical milestone meeting and ultimate decision maker for the project   |
| Project Manager                    | Responsible for overseeing the implementation of the application. Helps plan meetings and should have a strong understanding of the overall goals of the implementation and ERP features/functions |
| Procurement Business Process Owner | Responsible for designing and approving business process flows for all procurement processes   |
| Finance / Accounting Process Owner | Responsible for designing and approving business process flows for all finance related processes. Responsible for testing all accounting related transactions and processes for the implementation |
| IT Integration Owner               | Responsible for managing the integration between ERP and internal systems  |





# Implementation Methodology



Armanino Primary

- Detailed project plan
- Status reports (weekly)
- Issues list
- Project kickoff meeting
- Walkthrough business process document
- Integration requirements
- Training plan
- Refine estimate

- Review configuration based on business process review document
- Solution review walkthrough

- End user training
- Support user acceptance testing
- Issue resolution

- Go-No Go
- Cutover plan
- Final data migration

- Go-live support
- Post go-live support (first period close)
- Intro to Managed Services

Client Primary

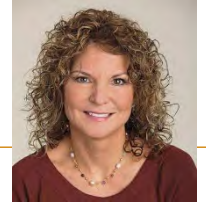
- Project kickoff meeting
- Mobilize project team
- Complete business process document
- Identify business use cases
- Create change management plan
- Feedback on project plan
- Requirements sign off

- Assign security roles
- Solution review walkthrough
- Validate data migration
- Business scenario sign off

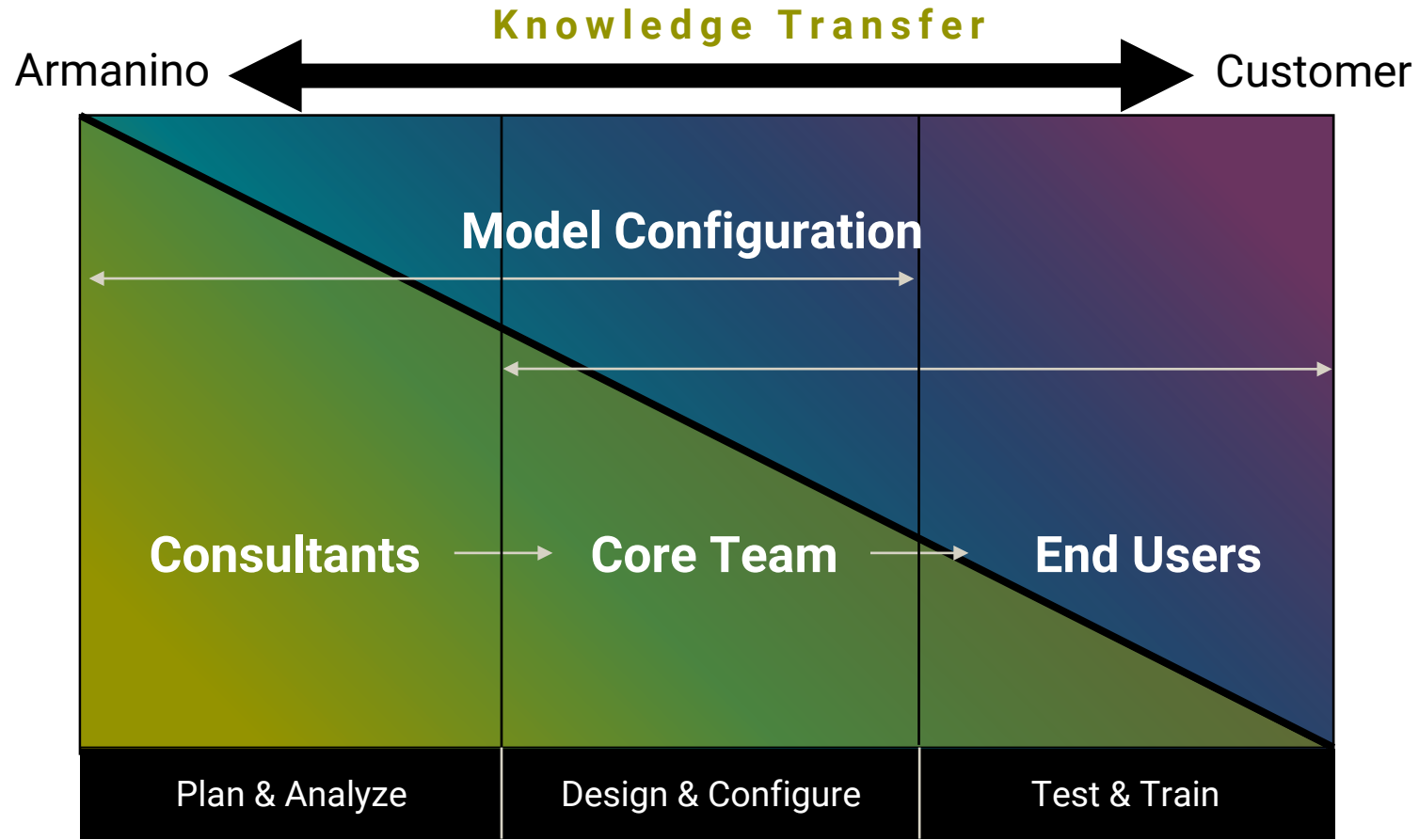
- End user training
- User acceptance testing
- Configuration sign off
- UAT testing sign off

- Solution go-live
- Perform manual data Conversion (as needed)
- Validate data conversion
- Go-live sign off

- Operate solution
- First period close
- Refine security model
- Project closure sign off



# Implementation Methodology





Ensuring Implementation Success

# Project Management



LEADERSHIP. ORGANIZATION. COMMUNICATION.

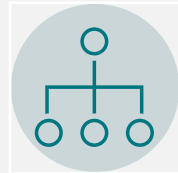
# PM Fundamentals



ACCOUNTABLE  
FOR THE  
OPERATIONAL  
DELIVERY OF  
EXCELLENCE



RESPONSIBLE FOR  
SCOPE SCHEDULE  
AND BUDGET



SINGLE FACE OF  
DELIVERY FOR  
THE TEAM



PRIORITIZATION  
OF RISKS, ISSUES,  
DECISIONS AND  
WORK TASKS





Orchestrating Success

# Project Manager

## Oversight

- Maintains Project delivery for key milestones & serves as main POC
- Manages resources & provides weekly project status reporting

## Governance

- Assures quality and timely completion of project deliverables
- Ensures compliance to project budget and schedule reporting on status/budget/scope reporting

## Communication

- Develops project plan and estimates to plan/coordinate work activities and resources
- Proactively communicates with project team & project sponsors

## Risk Management

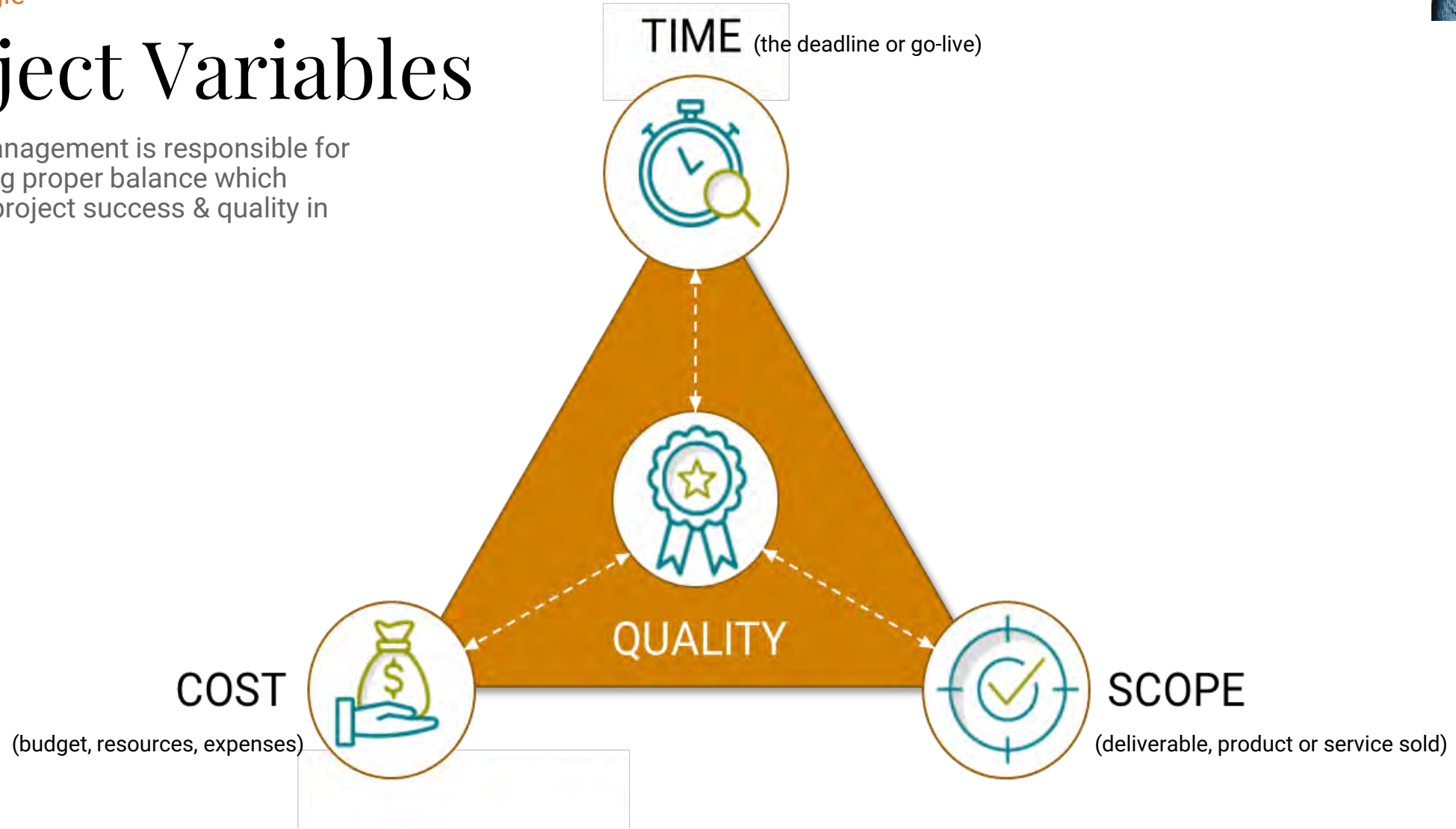
- Proactively identifies scope issues and facilitates change management process
- Manages issue resolution process and risk mitigation efforts

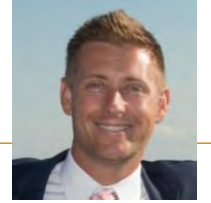


Iron Triangle

# Project Variables

Project Management is responsible for maintaining proper balance which results in project success & quality in execution





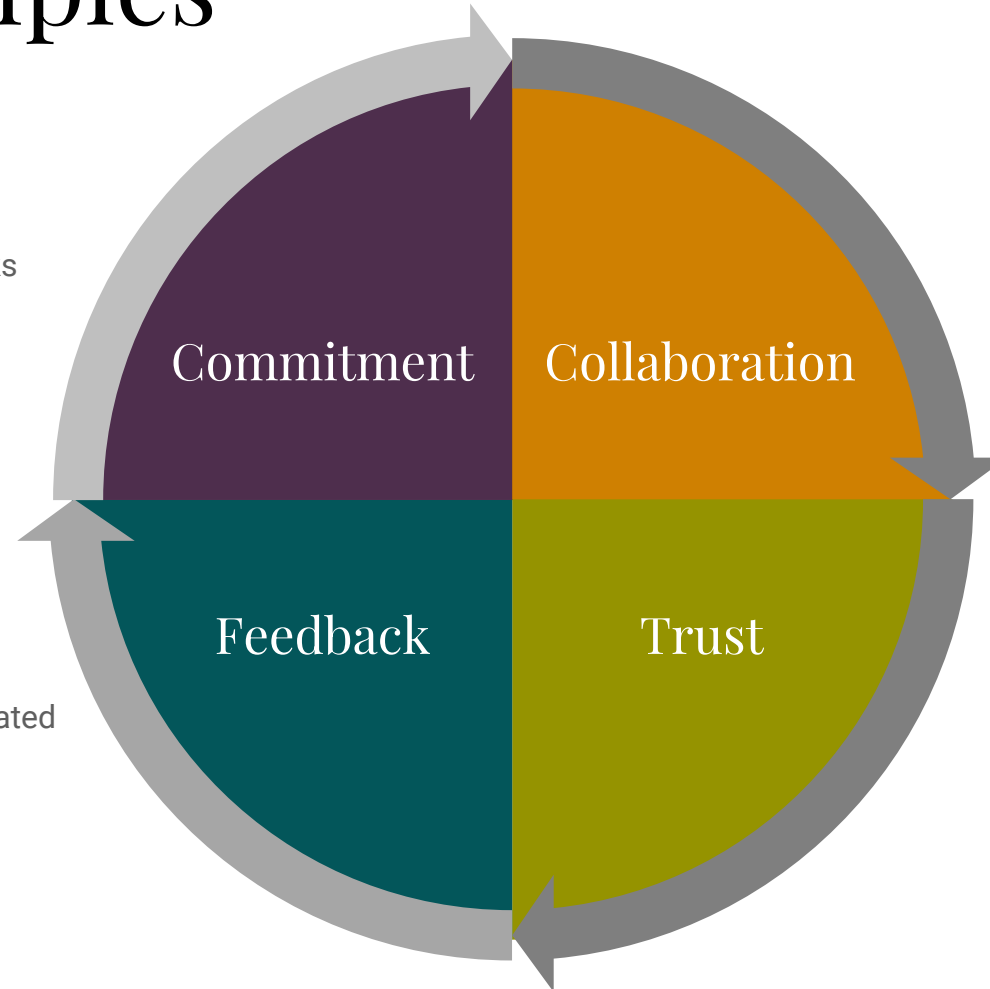
# Project Principles

## (1) Be present

- Attend meetings
- Monitor and update tasks
- Communicate blockers and risks
- **Challenge the status quo**

## (2) One Team

- **Aligned** with common goals
- Sharing information and knowledge
- Using a common communication framework



## (3) Trust

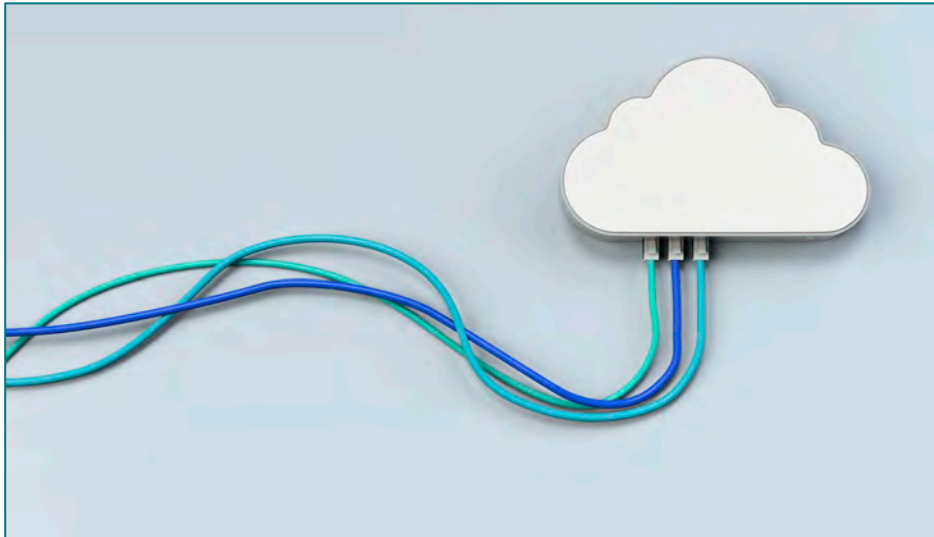
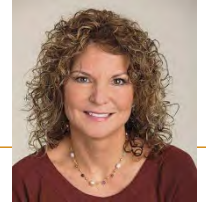
- Allows us to rely on each other to achieve **project success**
- Increases engagement and overall satisfaction
- Enables honest feedback

## (4) Feedback solicited

- Findings continuously communicated and applied
- Processes improved
- **Team empowered**

# Managed Services





## TECHNOLOGY

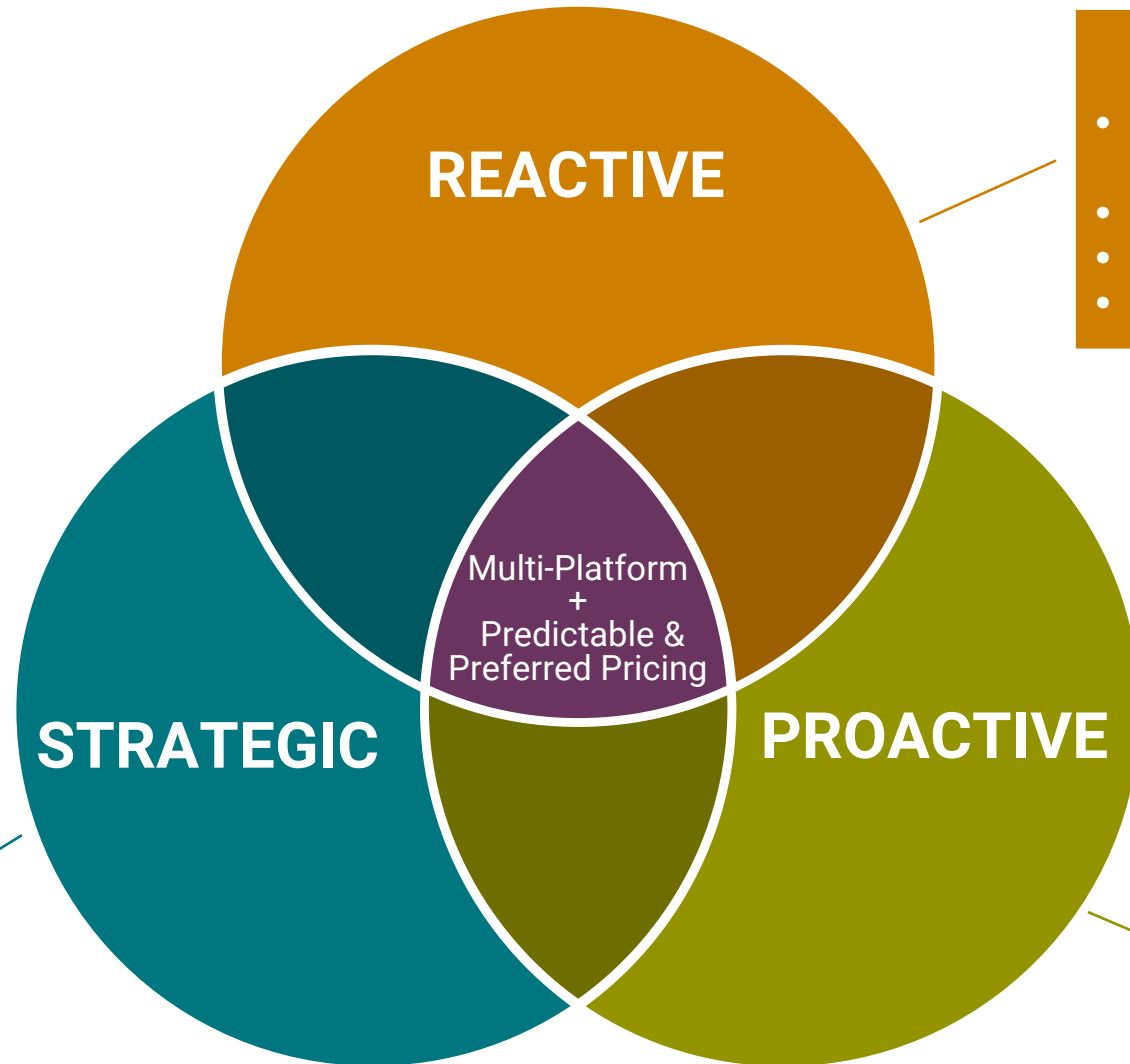
# Managed Services Program

The Managed Services program is a proactive and strategic approach for managing your technology platforms. Our highly specialized functional experts provide the resources so you can optimize your **enterprise resource planning** (ERP), **customer relationship management** (CRM) and **financial planning and analysis** (FP&A) solutions, with bundled pricing that is cost-effective and predictable.



OVERVIEW

# Managed Services Program



 **REACTIVE**

- On-demand Functional & Technical Support
- Break/fix Tickets
- Systems Administration
- Service Level Agreement

 **STRATEGIC**

- Armanino Expedition Sessions
- System Enhancement
- Strategic Planning

 **PROACTIVE**

- Dedicated Managed Services Lead
- Steering Committees
- System Review
- Armanino Academy



ROLES AND RESPONSIBILITIES

# Engagement Methodology



# Possible *(Re)Defined*<sup>TM</sup>

Additional questions?  
Reach out to us at [Experts@armaninoLLP.com](mailto:Experts@armaninoLLP.com)