

Step 1: Prepare for aACE Discovery

Last Modified on 03/04/2022 11:25 am EST

A successful ERP implementation involves much more than developing and testing software. Corporate change management, employee buy-in, and the involvement of senior management are also critical to a successful outcome.

Assembling an Implementation Team

The first step in preparing for the implementation is to organize your team. Your implementation team will be the first of your staff to learn your new aACE system. They will be instrumental in surfacing the details of how your work processes and your information need to flow through the system. We recommend selecting staff who have detailed knowledge of your current workflows, policies, and procedures.

A project manager is required. Then recommend selecting a representative from the following other areas of your operations.

Project Manager

Your internal project manager will act as the primary point of contact for your organization. Your project manager will be responsible for managing your implementation team, gathering and delivering all required materials, coordinating meetings, and managing the communication flow to upper management.

Sales

This team member (or members) should understand your sales process from start to finish, including details of how you quote, follow up, and close sales. You may also wish to include a sales assistant because they often know more than the higher level sales staff about the transition from sales to fulfillment.

A/R, A/P, Accounting

This team member (or members) should have a thorough understanding of your current system with regards to accounts receivable, accounts payable, and accounting. You will want to select someone who can give details of how your company collects aging receivables, handles payables, manages cash flow, accounts for inventory, and processes payroll.

Marketing

This team member should have an in-depth understanding of how you currently track your marketing campaigns. They should have knowledge of how you monitor conversions and campaign ROIs. If you are not currently tracking these things, knowing how you would like to track them can also be helpful.

IT or System Manager

This team member should have a thorough understanding of your current IT infrastructure and have an aptitude for systems management. They will be responsible for setting up and managing users and their access, as well as ensuring the system continues to run smoothly from an IT standpoint.

Operations / Fulfillment / Customer Service

One or more team members may be required from these roles. These members should have a good understanding of the workflows and company policies surrounding the fulfillment process and customer support (e.g. project managers, production managers, account managers, traffic directors, shipping / receiving personnel, warehouse managers).

Top Management or COO

It is strongly recommended that you enlist one or more top department heads to participate. They can be very helpful when it comes to understanding the reporting requirements and workflow oversight.

Next Steps: Getting into aACE

Once you have your team assembled, you will meet with your aACE team leader to discuss a plan to move forward.