ERP360 Lessons Learned Themes

Summary of Key Takeaways from the ERP360 Lessons Learned included human capital, staffing concerns, and organizational change management (OCM). A plan for transformation involves a clear roadmap, timeline, and detailed plan with milestones. The plan should allow for time to facilitate conversation for the impact of change on staff, changing roles, responsibilities, and processes. As well as ensuring consistency, adhering to best practices, industry standards, and operational efficiency/sustainability. The implementation partner is crucial, and a 6-10 year timeline is recommended for full ERP deployment. Testing and ensuring security are also essential aspects of the transformation process.

These key themes are not necessarily actionable items, NDUS may or may not address all the items listed.

1. **Human Capital**
   a. Staffing concerns (turnover/retirement)
      i. Include leadership turnover plan
   b. Backfill strategy!
   c. Stipends
   d. Hire different skillsets
      i. Test skills of employees
   e. Develop a new department
      i. Innovation and Change
      ii. Facilitate and lead the change management and transformation needed

2. **Organizational Change Management (OCM)**
   a. Assessment – impact of change on staff
      i. Changing roles and responsibilities
      ii. Changing processes and process improvement
   b. Training
      i. Multiple sessions and multiple methods
   c. Communication Planning
      i. Multiple methods
         1. Try new ideas like podcasts
      ii. Multiple times
         1. Demo product early and often
   d. Sponsorship Roadmap
      i. Long project
      ii. Secure Funding

3. **Governance**
   a. Decision Makers
   b. Core Principals
   c. Consistency

4. **Digital Transformation**
    a. No more customizations
    b. Use deliverables (as much as possible)
    c. 3rd party consolidations (Integrations)

5. **Business Transformation**
    a. Clean Sheet Exercise
        i. Keeping the output and end customer in mind rather than focus on us and what we need.
    b. Full Process Reviews
        i. Every department
        ii. Every institution

6. **Defined roadmap/timeline**
    a. Detailed Plan with milestones

7. **HCM/FIN at the same time**
    a. Due to the tight integration between the two
    b. Fiscal year vs other

8. **Implementation Partner**
    a. Importance of the right partner
    b. Cheapest is not always best

9. **6-10 yrs for full ERP deployment**
    a. Clock starts once funding and plan is secured
    b. Testing, testing, testing
    c. Cohort deployment is best practice

10. **Data Warehouse (Vendor provided)**
    a. Proprietary deliverable (merge with current Data Lake)
    b. Some utilization, some unnecessary
    c. Historical year reporting challenges with very different system setups.
    d. Need a clear understanding of impact and how this will be managed.

11. **No Money Savings**
    a. You will not save money, don't use to sell idea
    b. More efficient
    c. Better design
        i. More intuitive

12. **Security**
    a. Role based