

The Complete Guide to

# Project Methodology for ERP Implementation

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*Leverage Technologies' approach to implementing your new  
ERP solution in a way that suits the size & scale of your project.*



**leverage**  
technologies

Implementing an Enterprise Resource Planning (ERP) solution is a significant change. The implementation partner you choose to work with is important - your future business success depends on a well-managed project that achieves your goals.



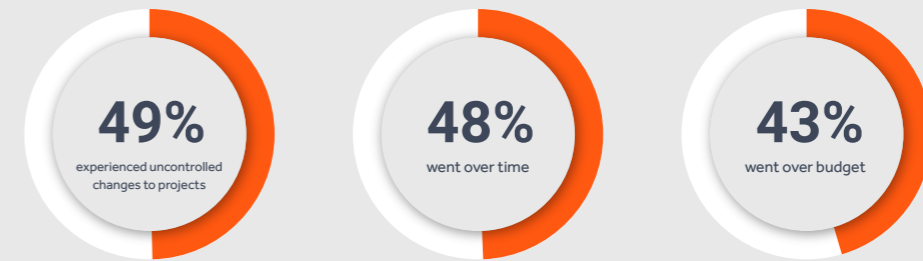
## What's in this guide?

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# The Right Approach for Your Project

## Global Project Manager Survey



A global survey of more than 3,000 project managers.

### How do you know when a project has been a success?

The hallmark of a successful ERP implementation is when the expected business benefits line up with the actual outcomes the project delivers.

Reliably delivering projects is not an easy task - indeed many projects are plagued by budget overruns, delays, and scope creep.

When it comes to project management nous, the sophistication and pragmatism of your ERP implementation partner matters a great deal.

Especially when you consider that there are many ways to reach an end goal successfully. It's important to use the most appropriate approaches and tools for the job, on each specific job.

Leverage Technologies has established frameworks and intuitive knowledge, but we don't believe in a 'one-size-fits-all' approach. We work closely with our customers to understand your individual business and project needs.

### We help you navigate the best way forward.

When you choose to work with Leverage Technologies to implement an enterprise system, we help your business to determine the methods, processes and terms of engagement that best fit your business and the project.

We take a flexible and consultative approach right from the beginning.

**Before you sign an agreement, there are a number of steps we take to ensure the project will be mutually beneficial for both of us, such as:**

- An initial workshop and discovery about your budget, your goals, your current ways of working, plans for the future and internal capabilities.
- The development of a detailed proposal, project scope and statement of works that helps you to evaluate your options and gauge our suitability as implementation partners.

**We don't want to put any roadblock in the way of a successful delivery, so we also collaborate closely with you to determine a mutually beneficial structure in regard to:**

- How we work together
- How we manage the project and which methodology to use
- Payment terms and conditions
- Required business benefits and ROI

### Let's talk terms of engagement

We understand each business may have slightly different needs, so we offer multiple ways to structure billing and payments.

#### We can structure our agreement to bill for services:

- Based on hourly/daily rate (or time and materials)
- Based on a fixed price for a well-defined scope of deliverables
- Based on a pre-purchased number of hours
- A hybrid approach (fixed fee for some deliverables combined with flexible consulting hours)

For instance, you could engage us on a consulting-as-a-service basis: receiving a set amount of hours of our time each month, almost like a subscription service enabling costs to be covered by operational expenditure rather than a large capital expense.

The structure that suits your project will be influenced by the project methodology, and which payment method and frequency allows you to manage your budget effectively.

#### We give you peace of mind around costs through:

- Weekly time sheets and detailed descriptions for time and materials implementations
- Invoices issued on the completion of agreed project milestones (where relevant)
- Itemised invoices that clearly explain what costs have been incurred
- Clear communication and approval before progressing changes to scope and ad hoc work that will incur additional fees.

“ We were influenced in our choice of MYOB Advanced knowing we'd have a partner that could help deliver the platform we required. Leverage Technologies has been very structured, organised and professional.

*Mark Mulder, Nextt Group*

# Which Project Methodologies Do We Use?

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There are various project management methodologies that guide the delivery of products and projects. A methodology is a system of methods and the theoretical models that underpin them.

Projects implemented by Leverage Technologies typically follow one of two methodologies:

**Linear / Waterfall**, a steady, sequential approach based on a detailed scope of works

or

**Agile**, an approach based on a "build and test" as you go methodology – lean thinking by aligning implementation functions with customer requirements in a constant feedback loop.

## What's the difference between linear and agile?

A **Linear, waterfall-based approach** involves working towards a clearly-defined endpoint, with minimal deviation in the steps taken to achieve that goal. The project team creates a project plan and sticks to it until the implementation is delivered in total. As smaller, sequential goals are achieved, the project progresses - each phase cascades into the next until the project is complete.

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You can plan for your costs and timing up-front

You know exactly what work/outcomes will be delivered

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Hard and costly to incorporate changes if needed

Disagreement about scope is a possibility if it is not well-defined

An agile approach starts with an end goal in mind, but allows for testing of assumptions throughout to continually re-align the ERP solution to meet needs and demands (of your business, employees, and customers). Discrete pieces of work are prioritised and completed within a set timeframe, then reviewed and evaluated, which can change the scope and direction of the rest of the project.

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A more flexible approach - well suited for smaller, customised Projects

Changes in deliverables are easy to manage due to smaller, more refined scope

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Budgets cannot be "fixed" upfront

Customer required to invest more time and effort in the Project due to high levels of collaboration

The key difference is the level of fluidity around the objective you want to achieve, and your desire to revisit and revise the expected outcomes during the project.

If you refine the system as you go, it can result in a more nuanced configuration and a better alignment with business goals. But you won't have a crystal-clear indication of the total costs and timing.

Whereas a waterfall methodology requires that every step is planned out more precisely, allowing for certainty around timing and budget. However, your expectations around the kind of system you will achieve (what it's configured to do and for who) must remain stable throughout the course of the implementation.

### Does a fixed or flexible approach make more sense?

When you work with us, we explain methodologies and how they affect delivery, and help you narrow down your choice. We'll provide you with a recommendation based on our understanding of your budget, internal resources, goals and risks.

Depending on the complexity and size of a project, strict adherence to a defined methodology may be more or less important. A mix of different approaches might make sense for some customers - especially those that break down implementations into multiple phases.

Agile approaches are becoming more appealing because business models are becoming less rigid. If your business is highly adaptable to meet evolving customer needs, offer new products and services, and leverage emerging technologies, the way you manage your ERP implementation project may also need to be more adaptable.

Understandably, the methodology you choose will affect the cost of the implementation and other factors related to how the project is delivered. But in many ways, our approach to project management, guided by the PMO, remains consistent regardless of whether you choose a fixed or flexible approach.





## Projects Big or Small Require Effective Management

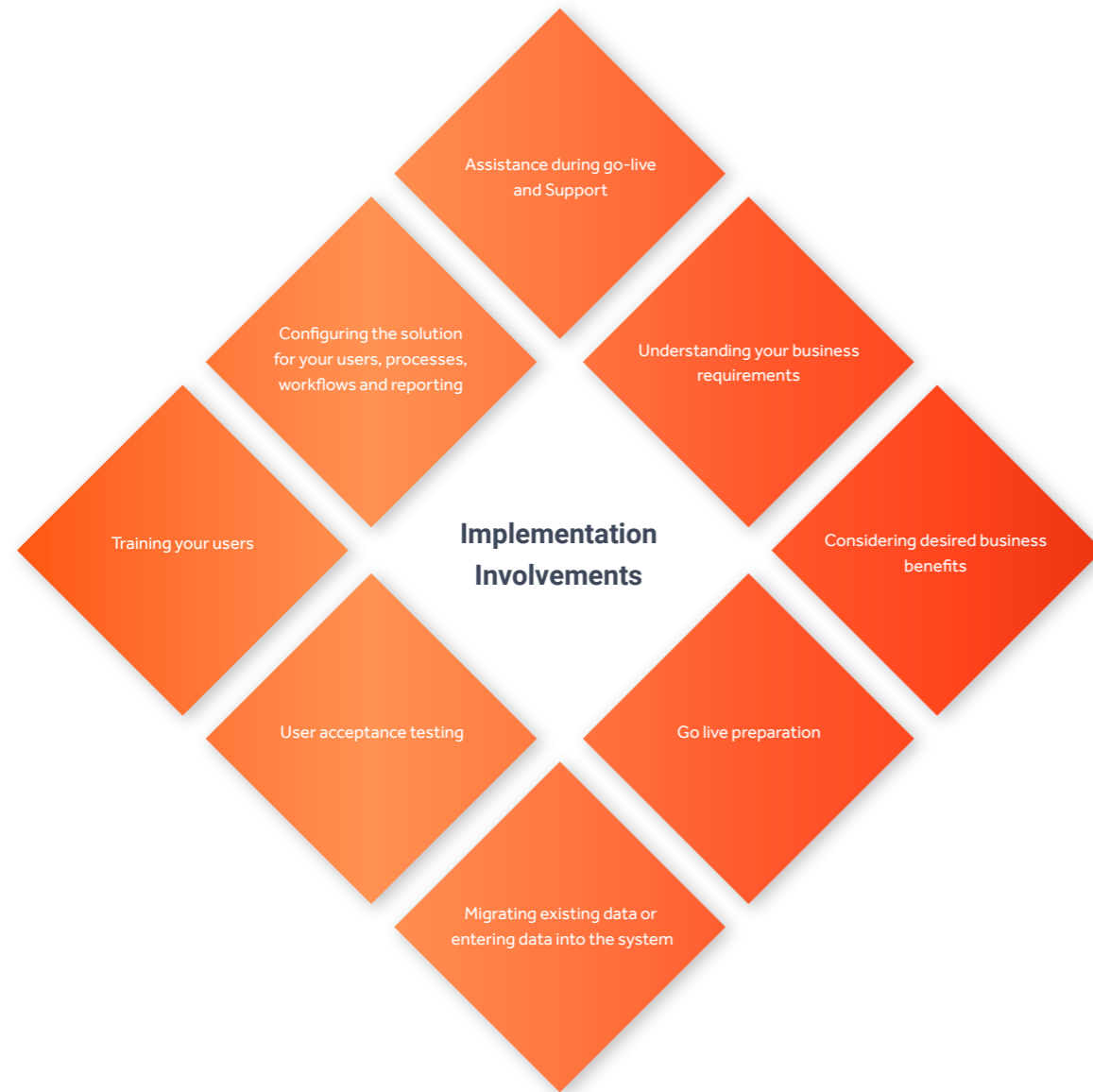
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Whether your project is straightforward or complicated, there are core processes that require technical skill, coordination, product knowledge, and people's time and attention.

The path to implementing ERP software well also depends on the outcomes you prioritise. For example, the extent of automation you want to apply, the kind of improvements to cash flow, production and customer service you need, and the level of data-driven analysis required.

**“The most significant risk is that a project doesn't deliver the outcomes and benefits you want.”**

**Projects are inherently risky.** Because a project is different to normal work and has constraints (scope, time and budget) there are many ways it can be derailed. Going over time and over budget are two major risks.



**Implementation Involvements:** The complexity of each step will depend on your business requirements, the structure of your operation, the number and type of users, and the amount of configuration, custom development and integration work needed.

**Factors that increase difficulty (and risk) during a project include:**

- Choosing the wrong product, team or implementation partners
- Setting unrealistic timelines (assuming everything will always go to plan)
- Lack of budget to meet desired goals
- Data from multiple sources that isn't clean and up-to-date
- Lack of internal resources, availability or commitment
- Lack of clarity around business requirements and reporting needs
- Overlooking compliance with programs such as HACCP and ISO
- Under-estimating the need for custom development and integration

These factors result in a mismatch between expectations and what is practically possible. Risks can also emerge unexpectedly during the project due to incorrect decisions, missed tasks and flawed deliverables.

Even if nothing seemingly goes awry, a project with poorly defined goals, unrealistic project plans and lack of strategic oversight is dangerous.

It's possible to finish the implementation with software that 'works', yet fails to enable the workflows, processes, initiatives and insights that will actually position your business for future success.

**Benefits from structured project management:**

Poor project management increases the risk that your implementation will fail to deliver the benefits you want. Effective methodology and project management expertise mitigates that risk.

Irrespective of the size of the project, Leverage Technologies brings attention-to-detail, superior communication skills, tested project management techniques, and industry knowledge.

When you work with Leverage Technologies you benefit from the know-how of our consultants and the steadfast guidance of our Project Management Office (PMO).

**The PMO provides overarching coordination that helps ensure:**

- Interactions between all the people involved are coherent and helpful
- Progress is accurately measured and monitored so issues can be rectified quickly
- The team remains unified and focused on delivering business value



# Partnering With You: Who Does What During a Project?

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The Leverage Technologies Project Management Office and consulting team guide your ERP implementation project and configure your new system.

But running a successful project also requires collaboration with your business, and the involvement of your team. Our ability to do our work is dependent on your business completing tasks and providing input.

**Your business' contribution during a project would typically include the following:**

- Strategic planning and support
- Project sponsorship and governance
- Internal project management/coordination
- Advice on functionality and business requirements
- Advice on reporting and financial management needs
- Data cleaning, manipulation and entry
- Being trained and training other users
- Testing the system, identifying and reporting issues

Participation from your business' leaders during execution is crucial, otherwise you run the risk that the final system is shaped by the functional needs of end-users rather than strategic business benefits.

An internal project manager or coordinator is important to oversee the completion of tasks assigned within your business and liaise with Leverage Technologies.

A strong contingent of staff allows you to 'self-steer' many aspects of the project. Therefore, the availability of 'internal muscle' can increase the speed of implementation, which reduces your project costs.

# Leverage Technologies' PMO Delivers Assurance & Results

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**Our project expertise by the numbers.  
We manage up to 30 ERP implementation  
projects every year (and growing). We've  
been in business since 2005, and in that time  
have skillfully guided more than 350 projects.**

Implementing an enterprise system isn't something you do every day. But in our case, it is.

We've honed our project management skills and you benefit from that experience. We draw on knowledge of similar jobs in similar industries, and a rich repository of governance, planning and best practice project management approaches that we've developed over the years.

Our organisational structure, processes, and culture all revolve around the best ways to apply our knowledge to help you select and implement the ideal ERP solution to achieve your specific objectives. The Leverage Technologies Project Management Office (PMO) plays an essential role in every implementation.

## The PMO Coordinates.

**High-level** governance, compliance and standardised processes across all projects

**Creation of** detailed schedules, variations and reports to manage project deliverables

**Providing comprehensive** Project Dashboard Reporting throughout each project

**Tracking execution** for each project including managing risk and change

**Facilitating** meetings and communications between the company and the customer

**Ensuring** people involved in projects have the skill and support needed to perform well

**Forecasting and monitoring** financial performance to keep costs under control

**Measuring satisfaction** and capturing learnings from each project to refine future work.

From the initial kick-off meeting through to the final wrap-up after your system goes live, our PMO ensures projects are on track.

## Getting everyone on the same page.

The PMO does the homework at the start of the project to ensure the implementation will be quicker and easier.

**This happens in multiple ways including:**

**On-boarding your business and collecting contact information and details** to ensure we can establish accurate documents and contact the most relevant person as and when required.

**Developing a detailed agreement** that outlines billing, milestones and other customer-specific conditions involved in delivering the project.

**Developing a comprehensive project schedule** based on the budget, scoping documents, resources, tasks and deliverables involved in your project.

**Running a kick-off meeting** to create a shared understanding of the purpose and plan for execution with the project team and business leaders and build team cohesion.

## Transparency and Communication.

Our competent, centralised PMO gives you confidence that **everything is going to plan by:**

- Making project progress visible and easy-to-understand
- Communicating frequently and clearly

We are focused on reducing your risk, monitoring each element of the project, and ensuring that the project is aligned with your goals, budget and timeline at every point. We hold regular **Project Status Meetings** to check-in with the entire project team.

We keep you informed - and collaborate with you to work through any issues that arise in a thoughtful and efficient way.

**You'll receive weekly updates that include:**

- Who worked on what and what they did (via detailed timesheets for time and materials projects)
- Where progress has or hasn't been made (Project Progress Reports)
- Early warning signs of issues or overruns
- Estimates and analysis to guide decision-making.

Every customer receives access to an online project dashboard specific to your project and **highlights information such as:**

- Budget consumption versus total planned budget
- All phases of the project and current activity
- Status of each task or element of the project
- If any aspect or phase is potentially at risk.

## No surprises, well-managed change.

We monitor risks, forecast financial variances and flag issues as early as possible so they can be carefully managed by **considering alternatives such as:**

- Allocating additional budget
- Moving budget from one part of the project to another
- Reducing the scope or removing deliverable/s.

We have a sophisticated change control process to manage variations in the budget, resources, schedule or scope.

**Leverage Technologies' PMOs approach to change control includes:**

- A log that team members use to record potential changes and opportunities for improvement they identify
- Reviewing change log and determining - in consultation with the customer's project manager - if a variation is required
- Drafting change request documentation that provides a detailed overview of the change and its impact on the project (budget, timing, function and technical factors)
- Recording approved changes, updating project status dashboards and acting on changes.

## Tools we use to manage projects.

We use technology to streamline and automate reporting as much as possible to ensure information is readily available and easy to digest:

**Each project has a dedicated online portal for** collaboration across the whole project team (Leverage Technologies and your business) including a dashboard that enables you to review project status in real-time and access reporting

**Leverage Technologies record our work** using a cloud-based project and calendar tracking tool that seamlessly interfaces with the shared team workspace, meaning that any updates we make on our end are immediately available to you in real-time

**The tools we use make it simple** to update progress and tasks to ensure nothing slips through the cracks. For instance: new action items can be logged and assigned to an individual, who automatically receives an email that advises them they've been assigned the task.



## A Trustworthy Implementation Partner

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*Leverage Technologies has the knowledge, methods and team to ensure your ERP implementation project is reliably delivered and actually meets your business goals.*

We've helped businesses of all sizes embed enterprise software in ways that meet and exceed their expectations: from small to medium businesses with a turnover less than \$10 million through to larger organisations that turnover in excess of \$400 million. Our industry experience is also broad – we have customers and references in almost every industry vertical.

Our reputation for excellence in software consulting (and high rate of customer referrals) arises from this strong track record of project management success. We work with products we

know and trust, prioritise customer needs and satisfaction, and draw on our many years of experience to achieve economies of scale and scope.

Our maturity as a business and as project managers - ensures your business (and project) is in good hands.

When you work with us to implement your new enterprise solution you too will benefit from our flexible yet detail-orientated approach, leading to reduced costs, fewer risks, and a better return on investment.



## Ready to Transform?

As you prepare for the future, use this opportunity to make a more substantial investment in your capacity to run an integrated, digital business. Bring to an end the era of using basic accounting software and become a more empowered business, when you choose a fully-featured software solution from Leverage Technologies.

Take advantage of Leverage Technologies' migration framework to guide your transition. We start by talking with you about your needs and what's required to configure the system to make your business function better.

Our consultative approach is built on years of experience working with small to medium businesses across all industries, and an in-depth knowledge of ERP solutions for businesses like yours.

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Backed by world-class software.

