

After the Scope, What's Next?

Forming and Training Your ERP Project Organization for Implementation Success

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The decision is made. The money is budgeted. You're ready to begin your Enterprise Resource Planning (ERP) project implementation. Now what?

Successful projects share two key characteristics:

1. A goal. **Your scope.**
2. Experienced and skilled leadership and team members with clear expectations.
Your formalized project organization.

Why Do You Need A Formalized Project Organization?

A project organization formally identifies the key resources that need to be involved in implementing your ERP system, and clearly outlines each role and its expectations.

A formalized project structure facilitates effective communications, problem identification and solving, and decision-making. Most importantly, the project organization is the governance unit that ensures the project tasks are assigned and completed by the appropriate resources.

For effective ERP implementations, this project structure should include key institutional leaders, functional business office representation, and technical leadership and support personnel.

What Are The Key Roles In The Project Organization?

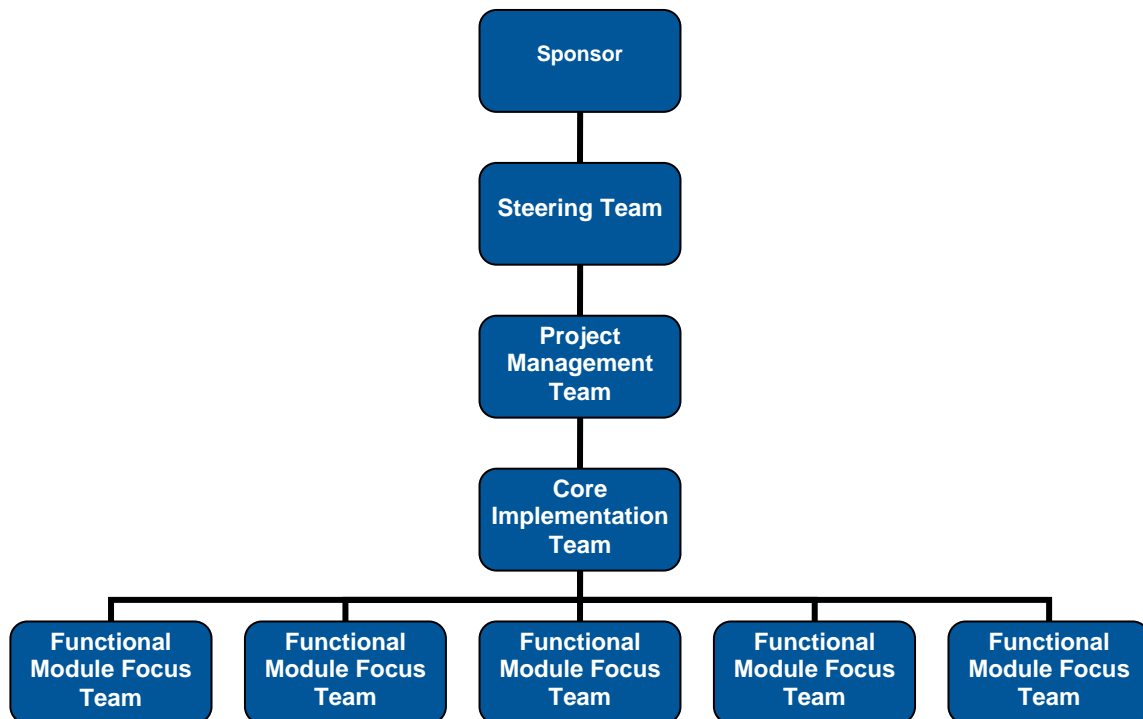
Successful project organizations typically include seven key roles. The following table outlines the general descriptions for each of these roles.

Role	Description
Project Sponsor	<ul style="list-style-type: none"> ◆ Champions the project – serves as the project cheerleader ◆ Removes roadblocks, and provides the resources, direction, and support needed to implement the project ◆ Provides input and makes decisions as needed ◆ Communicates support for the project to external and internal stakeholders
Project Leader/Manager	<ul style="list-style-type: none"> ◆ Serves as the key contact and spokesperson for the project ◆ Leads the project, the project management team, and the core implementation team in meeting the project goals ◆ Facilitates decision-making to ensure progress is being made on all tasks ◆ Facilitates the development and execution of a communication plan ◆ Escalates critical issues to the Steering Team or sponsors ◆ Manages project tasks, resources, status reports, and deliverables

IT Project Leader/Manager	<ul style="list-style-type: none"> ◆ Serves as the key information technology contact and spokesperson for the project ◆ Facilitates the information technology activities of the project ◆ Participates on the project management team ERP solution.
Project Team Member	<ul style="list-style-type: none"> ◆ Participates on the team because of expertise, experience, and knowledge ◆ Works together to accomplish team mission ◆ Follows good team processes
Subject Matter Expert	<ul style="list-style-type: none"> ◆ Has a particular area of expertise; experience knowledge limited to a particular time frame in the project's life cycle ◆ Attends team meetings, only when expertise is needed
Project Management Facilitator	<ul style="list-style-type: none"> ◆ Helps guide the team in using the project management processes ◆ Helps teams accomplish goals ◆ Group's process expert
Project Scheduler	<ul style="list-style-type: none"> ◆ Maintains the project schedule ◆ Participates on the project management team ◆ Updates the schedule weekly ◆ Provides reports to the team leader and sponsor ◆ Analyzes the effects of plan changes ◆ Identifies and expedites critical path tasks throughout a project's life cycle

What is a Typical ERP Organization?

The magnitude and impact of ERP projects require involvement from constituents across the institution. Developing a formal project organization helps institutions clearly define who should lead the project, who should be involved in the project, and the responsibilities of these participants. Typical ERP project organizations include a sponsor, a steering team, a core implementation team, and multiple focus sub teams formed around the functional modules. Following is a project organization chart illustration.



Steering Team

The steering team should include the top leadership of the institution to ensure buy-in and continuous support for this multi-million dollar, multi-year project. The steering team:

- ◆ Provides overall project direction
- ◆ Removes barriers and obstacles
- ◆ Sets boundaries and resolves policy issues and disputes
- ◆ Monitors progress of the project
- ◆ Communicates support for the project to external and internal stakeholders
- ◆ Controls a wide range of resources, especially ones critical for project completion
- ◆ Includes members who are highly influential across the institution and have a stake and interest in the success of the project

Project Management Team

The Project Management Team is responsible for maintaining the project timeline, project budget, and supervision of the daily implementation. The purpose of this team is to deliver the project on-time and within budget. The project management team:

- ◆ Ensures all project team members are aware of their responsibilities
- ◆ Manages the balance of project scope, resources, and timelines
- ◆ Monitors project pace relative to milestones
- ◆ Meets regularly with sponsors and steering team
- ◆ Selects and/or removes project team members
- ◆ Helps functional teams design schedule compression strategies in the event a functional team falls behind schedule

Core Implementation Team

The core implementation team is ultimately responsible for the successful implementation of the project. The project team members include people who are most directly involved in and affected by the ERP implementation. These typically include representation from the key business offices and information technology. Team members also serve as

focus team leaders for their specific functional or technical portion of the project, such as registration, finance, or human resources. The core implementation team:

- ◆ Communicates and coordinates with stakeholders

- ◆ Oversees the progress of the various project tasks
- ◆ Makes day-to-day project decisions
- ◆ Escalates issues to the steering team, as needed
- ◆ Anticipates and solves problems as they affect the project
- ◆ Ensures the project communication/involvement plan is in place and is being executed
- ◆ Supervises project vendors and consultants

Focus Teams

The focus teams are built around the functional and technical modules or components of the ERP such as registration, finance, financial aid, and vendor software implementation. The focus teams:

- ◆ Are responsible for the success of one specific aspect of the project
- ◆ Perform specific tasks related to the goal of the focus team
- ◆ Communicate and coordinate with the core implementation team
- ◆ Escalate issues to the core implementation team, as needed
- ◆ Anticipate and solve problems as they affect the project

What Training Do ERP Project Organizations Need?

Most ERP implementations involve resources who have never served on a project of this magnitude. Most have never had exposure to or experience in project management methodology. Therefore, to have skilled resources for the project, basic training should be provided. Following are examples of training that help support a successful ERP implementation.

- ◆ **Project Management Training** to provide a high-level overview of the methodology to be used to manage the project. This training provides all of the team members with common terminology and a common understanding of the processes to be used in managing the project.
- ◆ **Meeting Skills Training** to facilitate the best use of the team members' time in meetings. An ERP project requires continuous communications over a long period of time. Meetings become a necessity

to facilitate this communication; therefore, the goal is to make meeting time as efficient and useful as possible.

- ◆ **Team Leadership Training** to provide the focus team leaders with the basics of how to lead a team. With an ERP implementation, many people are placed in positions due to their functions within the institution. Many of them have never led a team. Functional or technical knowledge skills are not the same as team leadership skills.
- ◆ **Basic ERP System Education** to ensure all team members are under the rationale for the decision to implement the chosen ERP solution and have a high-level of understanding of the purpose of the ERP systems.
- ◆ **Communications Planning Training** to help the teams effectively develop and implement communications plans.
- ◆ **Potential Problem Analysis Training** to teach the project team members to effectively identify potential problems and develop preventive and contingent actions.

What Are Some Best Practices for ERP Project Organizations?

Functional & Technical Shared Leadership

While ERP systems are technologically based, they are driven by functional business processes and functional tables of information. Shared leadership and involvement with both the functional and technical areas of an institution facilitate a smoother and more successful implementation.

Roles and Responsibilities Tables

A project organization roles and responsibilities table serves the same function as a job and responsibilities

description in a typical department organization. Roles and responsibilities clearly define the specific role each project team member plays and the responsibilities they have within the project. The most important aspect of a roles and responsibilities table is its development and discussions required for final agreement.

Team Charters

Team charters are documents that clearly outline the specific responsibilities of each of the project organization teams including the steering team, core implementation team, and especially focus teams. A typical charter includes the purpose/goal of the team, responsibilities, membership, resources, and timeframes.

Successful ERP Projects Have Strong Project Organizations

At the heart of successful ERP projects is an efficient project organization. This project organization has strong leadership with clear goals, experienced and trained team members who understand their job descriptions and expectations, and critical processes in place to ensure effective communications, problem identification, problem solving, and decision making.



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