

Who Should Lead Your Campus ERP Implementation

Edwin T. Cornelius III, Ph.D.

For many higher education institutions the ERP is the most demanding and complex technology project ever undertaken on campus. Selecting the leadership for the project becomes one of the most important decisions to be made.

Functional or Technical Ownership of the ERP Project?

The first step is to philosophically decide where the primary responsibility or "ownership" of the ERP project belongs. Should the project be "owned" and therefore led by the IT organization on campus or should it be "owned" by the appropriate functional administrative department(s).

Doing project work is a way of life for most information technology (IT) departments, while functional departments typically have little or no experience with projects the size of ERP implementations. So, many institutions choose to let IT lead the ERP implementation. Rarely is this decision successful.

In the long-term, the ERP will be owned by the functional areas – they must establish the rules that govern system functionality; they must learn how the system will handle business processes within the department; and they must be able to obtain information by on-line inquiry or by creating their own reporting.

Therefore, we feel the ERP project's vision and direction should come from the functional departments. Then the IT organization is seen as the technological enabler of the institution's functional decisions and goals.

For example, with a student ERP system (which usually includes Admissions, Registration and Records, Financial Aid, Student Accounts, and related other functions), the leadership and direction should come from a respected manager in a student administrative function. Someone in the provost office such as an Associate Provost, or perhaps the Vice President for Enrollment management, or the Registrar would be possible leaders, based upon leadership traits, experience, and availability.

ERP Enables Functional Business Practices

Because technical knowledge and skills are so critical when implementing an ERP project, functional managers tend to concede project ownership and leadership to the IT organization. Unfortunately, the lack of vision and ownership of the project by functional management has often spelled disaster for this type of project (as many IT organizations understand).

The university community must understand that an ERP project ***is essentially an enabler of more efficient and effective business practices and business policies.*** The leadership and direction must therefore come from the business leaders on campus. The role of the IT organization is to make the technical decisions and provide the technical resources to support the academic and administrative goals of the implementation.

Leadership vs. Shared Ownership

Ultimately, successful ERP implementations require a sense of shared responsibility and ownership from the IT organization and each functional department. Involvement and engagement from all of the constituent groups – including the faculty, deans, and students – is critical for project success. However, the primary leadership should come from the functional areas.



Four Key ERP Leadership Positions and Who Should Fill Them

Although we believe that the leader of an ERP implementation should come from the functional areas, many leadership roles must be filled for successful implementation.

First, someone on campus should lead the effort to make the necessary policy decisions and functional decisions. This person will gain consensus around the functional direction of the project.

Second, someone should gain consensus on hardware and network solutions. Someone must facilitate making technical decisions and assign and supervise the project technical resources.

In addition, someone who understands modern project management tools and processes should hold a leadership position to successfully schedule, track and control progress against the project plan.

Finally, someone at the executive level of the organization must be able to set the vision, provide the resources needed, and be the final arbitrator of conflicting points of view and courses of action. This person ultimately will be responsible for ensuring the project is a success.

Rarely can all these ERP leadership hats be worn by a single individual on campus. We therefore recommend four key ERP leadership positions filled by qualified people including: project sponsor, project functional leader (who typically doubles as the overall project leader), project technical leader, and the project manager.

The functions covered by these roles are briefly summarized in Table 1. These roles may be labeled differently in various ERP implementations (e.g., the project manager role might be called “Project Director”; the functional leader role might be called “Functional Owner” or even “Project Leader”). Regardless of the title, the functions must be performed.

Role	Function
Project Sponsor	Provide overall leadership and direction, support and resources; the “champion” of the project (and a high ranking functional executive)
Functional Leader	Provide a vision for the ERP; engage and involve the various functional departments to make the functional decisions necessary; identify and ensure that changes in policies and business practices are made. The prime internal and external communicator for the project.
Technical Leader	Provide leadership in technical decisions that must be made to support the functional vision; marshal and oversee the technical resources that it will take to implement the ERP solution.
Project Manager	Schedule, track and control the hundreds of tasks that must be carried out; manage the day-to-day adherence to schedule; provide early warning for schedule delays and develop intervention strategies if necessary

To ensure a successful ERP implementation, leaders beyond these four roles and throughout the university must step forward and actively participate in the project.

Other leadership positions include process team leaders, technical team leaders, and steering team members. The implementation team itself is usually led by the project leader (the functional leader) or the project manager.

Some Leadership Models

Using a student ERP implementation as an example, following are four models that illustrate the variety of different ERP project leadership structures:

Model 1. Strong functional direction with provost office leadership	
Institution	Large public urban university in the south
Sponsor	Provost
Functional Leader	Associate Provost
Technical Leader	IT department manager with a primarily functional background
Project Manager	Contracted third party project manager

Model 2. Fairly strong functional direction with administrative management leadership	
Institution	Large public urban institution in the Midwest
Sponsor	Associate Provost
Functional Leader	Registrar
Technical Leader	An administrative computing manager from the IT organization
Project Manager	A contracted third party “shadow ¹ ” project manager who supports both the Associate Provost and the Project Functional Leader

Model 3. Joint project sponsorship model with an internal project manager	
Institution	Public Medical College in the south
Joint Sponsors	Provost/President of the College
Functional Lead	Vice President of Enrollment Management
Technical Lead	Manager in the IT organization
Project Manager	A professional project manager hired as a university employee for the life of the project

Model 4. Strong functional direction with a third party Project Director leadership role	
Institution	Private university in the northeast
Sponsor	Provost
Functional Lead	Associate Provost
Technical Lead	Administrative services manager in the IT department
Project Manager	A contracted third party project manager who served as the Project Director

¹ A “shadow” project manager is defined as an advisor who works in the background to ensure that project management tools and processes are being used by the project leader, and is providing help to the project leader in scheduling, tracking, and controlling the project.

Desirable Traits for the Key ERP Leadership Positions

Beyond functional responsibilities, decisions on the appropriate persons to serve in these roles should include personal characteristics, availability, and willingness to serve in these critical implementation roles.

Table 2 lists characteristics to consider in selecting the individuals for these four roles.

Table 2. Leadership Characteristics

Role	Characteristics
Project Sponsor	<ul style="list-style-type: none"> ◆ Political clout within the university ◆ Willingness and ability to make tough decisions ◆ Enthusiasm and support for the project
Functional Leader	<ul style="list-style-type: none"> ◆ Respect within the university ◆ Strong functional background ◆ Above average leader ◆ Good organization skills ◆ Good interpersonal influence skills ◆ Understanding of the university politics ◆ “Enterprise view” rather than “silo view” ◆ Above average communicator ◆ Positive about the project ◆ Willingness and ability to devote the time required
Technical Leader	<ul style="list-style-type: none"> ◆ Broad technical knowledge ◆ Good interpersonal influence skills ◆ Ability to communicate well with non-technical stakeholders ◆ Respect within the IT organization ◆ Respect within the university ◆ Good management skills ◆ Positive about the project ◆ Willingness and ability to devote the time required
Project Manager	<ul style="list-style-type: none"> ◆ Professional project manager (e.g., PMP) ◆ Experience managing an ERP project within higher education ◆ Good organization skills ◆ Good interpersonal and communication skills

Choose the Right Leaders

An ERP project will be one of the most demanding and complicated efforts undertaken by your institution. The ERP implementation will have a significant impact on the lives of many institutional stakeholders. Carefully consider selecting the people who will fill the four critical ERP leadership positions for successful implementation.

If you found this article helpful and would like to read more, please go to our website at www.collegiateproject.com and browse our ERP Library.