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# 9 Questions Nobody Asks Their ERP Partner ...But Should

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# 9 Questions Nobody Asks Their ERP Partner... But Should

Your choice of implementation partner can make a world of difference. The right partner will deftly manage the project to deliver a system that fuels your business growth. The wrong partner will stumble through the implementation, disrupting your business and costing you money.

## So how do you make the right choice?

**Ask tougher questions.** Every partner is ready with prepared answers to the common questions about costs, experience and implementation methodology. But deeper questions that force partners to think will uncover far more about their business practices and commitment to client success.

A great technology partner will welcome the tough questions, eager to share what makes them unique. They will engage the services team to help provide you with complete, honest responses.

To help you identify the great partners out there, we've gone straight to the source. We've collected questions and advice from recognized top ERP (Enterprise Resource Planning) and CRM (Customer Relationship Management) implementation partners you can use during your evaluation process.

Your business management systems are the foundation for your future. Go ahead and ask the tough questions. Your future depends on it.

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8. How often do you go over budget on implementations?
9. How does the size of your organization influence your services?



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## Our team says:

*To start, look for partners with experience in your given industry. This ensures they speak the same language as you and will be familiar with the processes and best practices of your industry. Then look for a partner who listens to your needs and isn't afraid to set the record straight.*

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# 1. What makes your implementation process successful?

Even though business management systems have become more intuitive and user-friendly over the years, implementations are still tricky. Fundamentally, you need a partner who will understand your business requirements and apply the software functionality to improve processes and profits. Ideally, you want to choose a partner who can demonstrate they have successfully completed implementations many times over. Ask them to show you proof!

## Define the process

Your partner should be able to clearly describe, with documentation, the phases, deliverables and expected outcomes of their implementation process. They should address how they approach at least the following:

- Requirements gathering and analysis
- Solution design
- Development and configuration
- Deployment and training
- Post-production support

## Discuss potential challenges

Every project hits bumps in the road and your partner should be well versed in how to smooth those out. Whether it's an undiscovered requirement or an employee resisting change, experienced partners should be upfront about potential pitfalls and how they will be handled when they happen.

## Check out references

Checking references is a crucial step. The partners you speak to should be happy to supply you with names and contact information for previous customers. Call or email those references with your questions and any particular concerns you have.

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### Our team says:

*Prospective partners should have a proven methodology in place as to how they carry out their implementations. While flexibility and adaptability are important for any implementation project, they should still have a time-tested framework and explain how it would be applied to your specific reality.*

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## 2. How can our company contribute to project success?

An unfortunate mistake some companies make is thinking their ERP implementation partner will come in and do all the work for them. To get the most value from ERP implementation, everyone in the organization should be involved and have a clear understanding of what is going to happen, why it is happening and how they can help.

### Executive leadership

A well-planned and well-executed ERP implementation will support the long-term goals of your business. The executive team, and managers of every department, should clearly articulate how the project is going to support those goals.

Working with your partner, the executive team can set a tone of cooperation and shared responsibility. Each department should understand how the system will impact and improve their business processes and productivity.

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### Our team says:

*A new ERP system will impact every aspect of your organization, so it shouldn't just be the finance department driving the project. For your project to be a success, you should include stakeholders from all your key departments to ensure it meets the needs and expectations of every team.*

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### Our team says:

*Don't underestimate the effort required from your team and make sure they can make the implementation a priority. This may mean reallocating their current tasks for the length of the project. If someone is already working 40 hours a week, they won't be able to fully commit to the project.*

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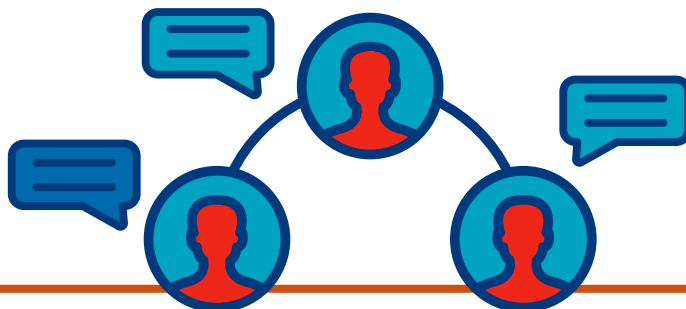
### Reduce fear factors

Change is always tricky, especially if there are people in your organization who are worried about new technology replacing them. An experienced partner will suggest a proactive communication plan to help alleviate fears and highlight positive outcomes.

### Give employees the time they need to be successful

One of the most common challenges during an ERP implementation comes when employees are asked to do their project-related work in addition to their full-time job. Stressed out, overworked, anxious people are not going to be able to give their best.

A clear strategy to ensure employees have the appropriate bandwidth to work on the project—from business process review through training—is critical to project success.



# 3. What is your approach to change management and training?

Change is hard, and if an ERP implementation is to be effective, there should be plenty of change. Your partner should be well-versed in change management with a plan from the outset to help you prepare your team.

## Prepare for resistance

People are inherently averse to change, sometimes so much so that they'll purposefully derail the project. Setting up regular lines of communication should begin before the implementation. Start talking about the change before it happens, so that everyone feels included in the process. Ask for ideas for improving current processes from the people that are doing the work.

## Take a phased approach

Discuss with your partner whether the project can be broken into smaller phases to minimize disruption and allow employees to become familiar with the new system over time. Working with your partner you can determine your priorities and tackle the most important problems first.

## Training time

A thorough training plan includes guidance before, during and after the ERP implementation. The training plan should include different learning styles to ensure no worker is left behind. On-demand training provides those self-motivated with unlimited training opportunities, but some employees will need more hand-holding.

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### Our team says:

*Don't underestimate the importance of change management. Having super-users and power-users available to answer daily questions is important to keep employees from reverting to their old habits. End users will be more likely to keep using the solution if someone is available to guide them.*

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# 4. How will we define and measure success?

Before taking on an ERP implementation, your organization should clearly define the desired outcomes. From the outset, your partner should be laser-focused on how the ERP system will help you achieve those objectives.

## Measure the transformation

An ERP implementation should be transformational, enabling your company to achieve strategic objectives more efficiently and effectively. Whether it's geographic growth, new product lines or increased productivity, the desired outcomes should be well-defined and measurable.

## Clearly define success metrics

For each of the project objectives, your partner should provide the KPIs (Key Performance Indicators) that will allow you to monitor progress. KPIs should be monitored throughout your ERP implementation, but even more importantly, they should provide ongoing feedback on company progress.

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### Our team says:

*Identify your scope and priorities. By adopting a phased approach and separating necessary features from nice-to-haves, it will be easier to keep it small at each phase of the project and avoid biting off more than you can chew.*

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### Our team says:

*One of the most important aspects of a new system is if the team has confidence in the numbers and data coming out of it. This is even more important when you are looking at a fully integrated ERP/CRM system, since this is where your organization will see the biggest returns.*

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Metrics defined for each function can provide the foundation for accountability and progress. A few examples of goals and associated metrics include:

#### Improve customer experience

- Customer ratings
- Repeat customers
- Call response time

#### Increase sales performance

- Average sale
- Average margin per sale
- Percent of lost sales

#### Increase productivity

- Transactions processed per employee
- Orders completed per employee
- Number of sales calls per employee

#### Increase profits

- Average margin per product/service
- Costs per employee per location
- Receivables aging

There may be specific industry-related KPIs that you need to track. Your partner should be familiar with those and provide guidance to establish the metrics that are critical for you to monitor.



## 9 warning signs from potential partners to send you running

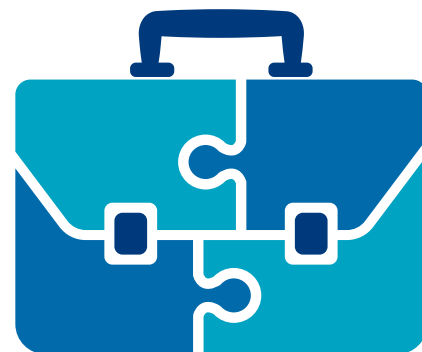
1. You've only met a salesperson (or two) but they promise they have the full support of the implementation team.
2. The partner has negative employee reviews on Glassdoor, which can signal a lack of focus on the employee experience and questionable company culture.
3. The partner has limited service capabilities. For example, they don't do customizations or provide technical support.
4. Conversations are all about out-of-the-box software functionality, and not focused on your unique business processes.
5. You have to explain basic concepts of your industry.
6. Their proposed hours are significantly less than the other estimates you have received.
7. There is no training or post-implementation support included in their proposal.
8. Their follow up and response time has been slow during the sales cycle.
9. They can't provide any references for you to contact.

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### Our team says:

*Budget is an important concern when making your choice, although it shouldn't be the only deciding factor. Your partner should be willing to work with your budget but also tell you when your expectations are unrealistic.*

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## 5. How will you assign people to our project?

Project success isn't determined by the people selling the services but rather by the project delivery team. The team may include the project manager, solution architect, engagement manager and consultants. Ask your potential partner if assignments will be based on expertise related to your business requirements (not just because individuals have open time). Your partner should be happy to provide brief resumes of your project team members.

### Experts with people skills

While expertise is critical to the success of your ERP implementations, personal and team skills are equally important. Each team member should bring expertise and people skills to the project.

**Business acumen.** Consultants should demonstrate a clear understanding of basic business functions, including financial, sales and operational process flows.

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### Our team says:

*You're about to enter a long-term partnership: your provider might also assist you in the future for the support, maintenance and migrations of your system. Make sure their values are in alignment with your own to have an idea of your long-term compatibility.*

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### Our team says:

*Technology moves fast. While certifications are not the be-all and end-all of what makes a good provider, their team should be keeping their competences and knowledge up to date. Ask to know more about the certifications and experience of the people who will be assigned to your project.*

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**Industry knowledge.** At least some of the members on your project team should have expertise in your industry. They should understand industry requirements and be able to provide best practice recommendations.

**Specialized skill sets.** Depending on your project requirements, your team should include (or have access to) specialized experts. From technology to development to data analytics—ask if the experts critical to your project will be available when needed.

**Training and change expertise.** The goal of the project team should be to prepare your employees to be comfortable and self-sufficient on the new system. The team should be well-versed in organizational change management to help in user adoption and acceptance of the project.

**Project accountability.** Your project manager should clearly define how challenges that arise during the implementation will be handled.

**Ongoing support.** At the end of the implementation, there should be a formal handoff to the next stage of your support. You should understand who your point of contact will be and what kind of response time to expect.



# 6. What makes your firm more qualified than the competitor?

As you evaluate ERP solutions, you're likely to talk to a number of potential partners. Finding the right partner to work with can be as important as finding the right solution to meet your organization's unique requirements. Your partner should be ready to tell you why they believe they can bring the most value to your organization.

## Industry expertise

Most of the partners you talk to will likely have an in-depth understanding of the software, but their knowledge of your industry is equally important. A partner with expertise in your industry has gained insight into best practices that other organizations use. They have learned lessons in applying the software to specific challenges and requirements of the industry that will save you time and improve the impact the solution has on productivity and profits.

## Certifications

Certifications can provide insight into more than just competence in the software. The level of vendor certification (gold, silver) can indicate how closely the partner is aligned with the software vendor. Higher-level partners often have faster access to support from the vendor's technical experts.

Technical, industry and functional certifications held by the people who will work on your project indicate expertise and a commitment to learning. With the pace of change in technology today, your partner and their employees should be committed to continuous training and professional development.

## A trusted advisor

While an implementation is short term, establishing a long-term relationship with your partner will deliver big dividends. Ask your partner, and talk to their references about the long-term relationships they have with clients. As a trusted advisor, your partner can help you take full advantage of your technology now and into the future.

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### Our team says:

*Ask how long clients have been with them on average. This will tell you whether they can keep their customers happy and how well a system can grow with a business. If clients have been with them for over 10 years, chances are both the provider and system have had the capacity to meet your needs.*

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## 7. How do you handle customizations?

Standard ERP functionality is designed to support the most common business processes. But most organizations have unique processes and requirements that aren't "standard." There are often ISV (Independent Software Vendor) solutions to fill in gaps or provide industry-specific functionality, but sometimes custom code development is required. Your partner should be ready to talk about the potential for customizations and how you will work together to find the best solution.

### Industry expertise

As mentioned in previous sections, the industry expertise of your partner can make a huge difference in the success of your implementation project. If your partner has deep experience in your industry, they will be familiar with the strengths and weaknesses of the ERP system for your business. They will be familiar with the ISV solutions that can bridge gaps and they will understand what customizations may be necessary.

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### Our team says:

*Before starting a development, find out what will be the implications when upgrading or migrating the system. These may affect the time and costs associated to these types of operations, as they can be more complex to migrate or even become obsolete as new versions are released.*

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### Our team says:

*Business management solutions are flexible, but it's important to understand the core philosophy behind the product to ensure it fits your vision and goals. Not every system fits every company, and customizations and developments can be costly to maintain if they stretch the system too far.*

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### Determine the best course of action

During the requirements analysis phase of your implementation, your project team will uncover any customizations that will be suggested or required. Your partner should have a plan for how you will evaluate options and choose the best course of action. Essential questions to ask include:

- Is there an ISV solution that will solve this issue rather than a customization?
- Would it be better to change our traditional business process for this situation rather than create a customization?
- Could we use automated workflows instead of customization to solve this issue?
- Will the customization cause us any issue during upgrades or new version releases?
- Can we custom create necessary reports that are not included in the system?
- How much experience do your developers have in creating this type of customization?

## 8. How often do you go over budget on implementations?

There are many reasons that a project can go over budget. Sometimes the culprit is scope creep when the project expands to address more than was originally proposed. There are projects where unknown issues come up, like an unexpected business process or integration requirement that can only be solved by a customization. Or the proposal underestimates the training and change management users need. Your partner should be able to tell you how often their projects go over budget and what processes they have in place when it does happen.

### Established process and clear project plan

Your partner should have a well-documented implementation process that clearly lays out how the project will be managed. Often, your partner will not be able to provide a final project budget number until the requirements analysis phase is complete. When your budget is set, a timetable and project plan should provide guidance on what will be required of your team to complete the project on time.

### Active project management

Keeping everyone on track, including your team, is the primary job of the partner project manager. The partner project manager should be working proactively to ensure you understand what resources will be needed to complete every phase of the project on time. They should be communicating regularly and actively with your project team, providing regular updates on project progress and any potential challenges to on-time, on-budget completion.

### Change orders

There may be situations during your project that requires a change order, which is a documented, well-defined addition to the original plan. Your partner should be ready to explain how that process will work if the need arises.

### Our team says:

*It may be tempting to skip the analysis, but this phase can save you time and money in the long run. By clearly identifying goals and priorities, a fit/gap analysis can be completed. Everyone involved in the project will be on the same wavelength, reducing the risk of cost overruns and delays.*



## 9. How does the size of your organization influence your services?

The size of your implementation partner's organization may have a significant impact on how your project is managed. A larger firm may have a wider breadth of consulting resources to draw from. A smaller, local or industry-focused professional team may provide more "personalized" service. There are several questions you can ask to find a partner that can deliver on your expectations.

### A deep bench

A larger organization is likely to promote the deep bench of consultants they can bring to your project. This can be especially helpful if your project is on a fast track or is an "out-of-the-box" implementation. On the other hand, a smaller team may have more of the industry specialists that your project requires.

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### Our team says:

*Look for a partner that offers both ERP and CRM services. This will help when your organization is ready to implement a CRM or to integrate the two systems. Firms with this specialization will help you instill best practices on what and how often this information should be synced.*

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### Our team says:

*Ask the provider about their current projects to have an idea of how many they can take up at a time, and inquire about past projects of similar size and scope. You will have a better idea of what challenges to expect and how prepared the team is to tackle your specific project.*

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### Experience counts

Find out if the project team has previously worked together. Teams that are assembled from remote locations may not know each other's methods and may require some ramp-up time. Teams who have worked as one on multiple projects know who is doing what and when.

### Commitment to training

The size of the partner does not automatically reflect their commitment to ongoing training—which is critical to the skill sets of your project team. Ask prospective partners about the training and professional development programs they have in place for employees.

### Company culture

Regardless of the size of the partner, their company culture will have an impact on your project. A great way to get insight into a company's culture is to look at their [Glassdoor](#) ratings. Current and past employees will give you an inside look as to how the company treats their employees. You want to work with a partner who values and empowers their employees.

## Choose a partner ready to answer the tough questions

Finding the best partner to help you make the right choices before starting your ERP implementation will save you time, headaches and money. By asking the tough questions, you can uncover the strengths and weaknesses of the potential partners you evaluate.

### Next Steps

Have any questions? JOVACO is ready to answer even your toughest ones.

Our specialists are available to analyze your needs and the best systems to meet them. By choosing to work with JOVACO Solutions, you choose a company with more than 35 years of experience and expertise in the implementation of ERP solutions. Our team works in partnership with your organization, and brings its wide array of technical skills and Microsoft certifications to your project. This way, we ensure that we only deliver to our customers a solution tailored to their specific business needs.

As a specialist in the implementation and integration of ERP and CRM solutions both on premises and in the cloud, we are here to help you realize your long-term technological vision.

[Review our implementation packages](#) for Microsoft Dynamics 365 solutions and choose the one that is best suited to your needs.

[Request a free 2-hour consultation.](#)

[Contact our team.](#)

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### Our team says:

*Ask if they have a proven process in place and don't be shy to ask for references. A good partner will be able to provide names of recent and/or longstanding customers. When speaking to references, ask not only about the partner but also lessons learned that you can take away for your own project.*

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# About JOVACO Solutions

Since 1983, JOVACO Solutions has been offering customized services to companies for the implementation and optimization of their ERP and CRM solutions. We offer all services required for the implementation, integration and maintenance of your system, from the initial analysis and installation to post-implementation support and training.

- [Microsoft Dynamics GP](#)
- [Microsoft Dynamics 365 Business Central/NAV](#)
- [Microsoft Dynamics 365 Customer Engagement/CRM](#)

In addition to our expertise in Microsoft products and extensive knowledge of Microsoft Dynamics ERP and CRM, JOVACO has been an Independent Software Vendor for over 20 years, delivering fully integrated project accounting and investment module solutions to users across North America.

- [JOVACO Project](#)

More than just a reseller, we partner with our customers to make sure that they get the most out of their investment. We work alongside you throughout every phase of the implementation to put your system in place, optimize your solution, and continue to work with you to meet your future vision.

## Contact JOVACO Solutions:

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The logo for JOVACO, featuring the word "JOVACO" in a bold, black, sans-serif font. The letters are stylized, with the 'O's having a unique shape and the 'V' being particularly prominent.