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BLUZEE

ERP Implementation Methodology

Bluzee Guide to Successfully Implement ERP Engagements

Bluzee – July 2024 | Mukundakumar K G

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Introduction

Improving Lives at Work with Bluzee

- Bluzee's mission is to simplify business operations and improve work life by providing an all-in-one management software solution.
- The software is designed to be user-friendly, highly customizable, and scalable to meet the needs of businesses of all sizes.

ERP Implementation Challenges

- Implementing management software can be complex and time-consuming.
- Common issues include resistance to change, data migration, user training, and system integration.

Odoo ERP vs. Traditional ERP: Success Rate

- Odoo boasts a higher success rate in software implementations compared to traditional ERP systems.
- The simplified and streamlined approach of Bluzee reduces the typical pitfalls associated with ERP projects.

Bluzee's Methodology Analysis

- Bluzee's implementation methodology is designed to address the common challenges faced during software deployment.
- Key aspects include minimizing custom development, focusing on user adoption, and ensuring projects are delivered on time and within budget.

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Key Drivers

Responsibilities of Project Leaders

- Stay on Schedule and Budget
- Customer Defines Needs, We Define Solutions
- Limit Custom Development

Keeping it Simple

- Fewer Meetings, Less Paperwork, Faster Decisions
- Limit Stakeholders and Custom Development
- On-site Change Management and Training Only When Needed

People

- Project Leaders as Problem Solvers and Experts
- Avoid Intermediaries, Train Key-Users Early
- Recruit, Train, and Retain Top Talent

Project Managers

- Recruit, Train, and Retain Top Talent
- Odoo Experts Challenge Critical Steps

Managing Customer Expectations

- Set Realistic Expectations
- Balancing Scope and Budget

Effective Communication

- Clear and Consistent Communication
- Feedback Loops

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What is a Successful Project?

Balancing

- Customer Satisfaction
- Budget Management
- On-Schedule Delivery

Key Priorities

- Onboard Users
- On Time
- Within Budget

Risk of custom development

- Increased Complexity
- Maintenance Challenges
- Dependency on Specific Developers

Customer Satisfaction Evolution

- Initial Excitement
- Dip During Implementation
- Post-Go-Live Satisfaction

Focus on Project Success, Not Early Service Upsell

- Building Trust and Credibility
- Avoiding Early Service Upsell
- Delivering Tangible Results

Sustainable Growth Through Successful Projects

- Reputation and Referrals
- Long-Term Customer Relationships
- Continuous Improvement and Innovation

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Managing Change and Resistance

Effective Change Management

- Implementing a new system often involves significant changes in business processes and workflows.
- Effective change management practices help ease the transition, reduce resistance, and ensure a smooth adoption of the new system.

Engaging Stakeholders

- Engage all relevant stakeholders early in the project to gather input, address concerns, and build support for the new system.
- Regular communication and involvement help mitigate resistance and foster a sense of ownership and commitment.

Training & Support

- Comprehensive training and support are essential for helping users adapt to the new system and feel confident in using it.
- Offer various training methods (e.g., workshops, online tutorials, documentation) to accommodate different learning preferences.

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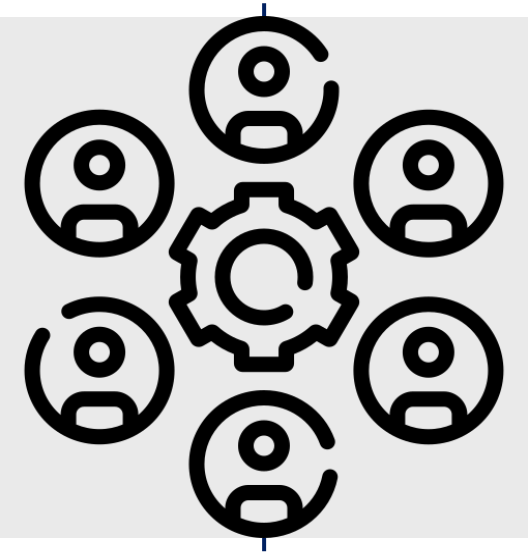
Critical Roles & Responsibilities



- ✓ Project Director
- ✓ Project Leader
- ✓ ERP Solution Expert
- ✓ ERP Developer
- ✓ Customer SPoC
- ✓ Customer Extra Roles
  - ✓ Steering Committee
  - ✓ Key users
  - ✓ Sponsors

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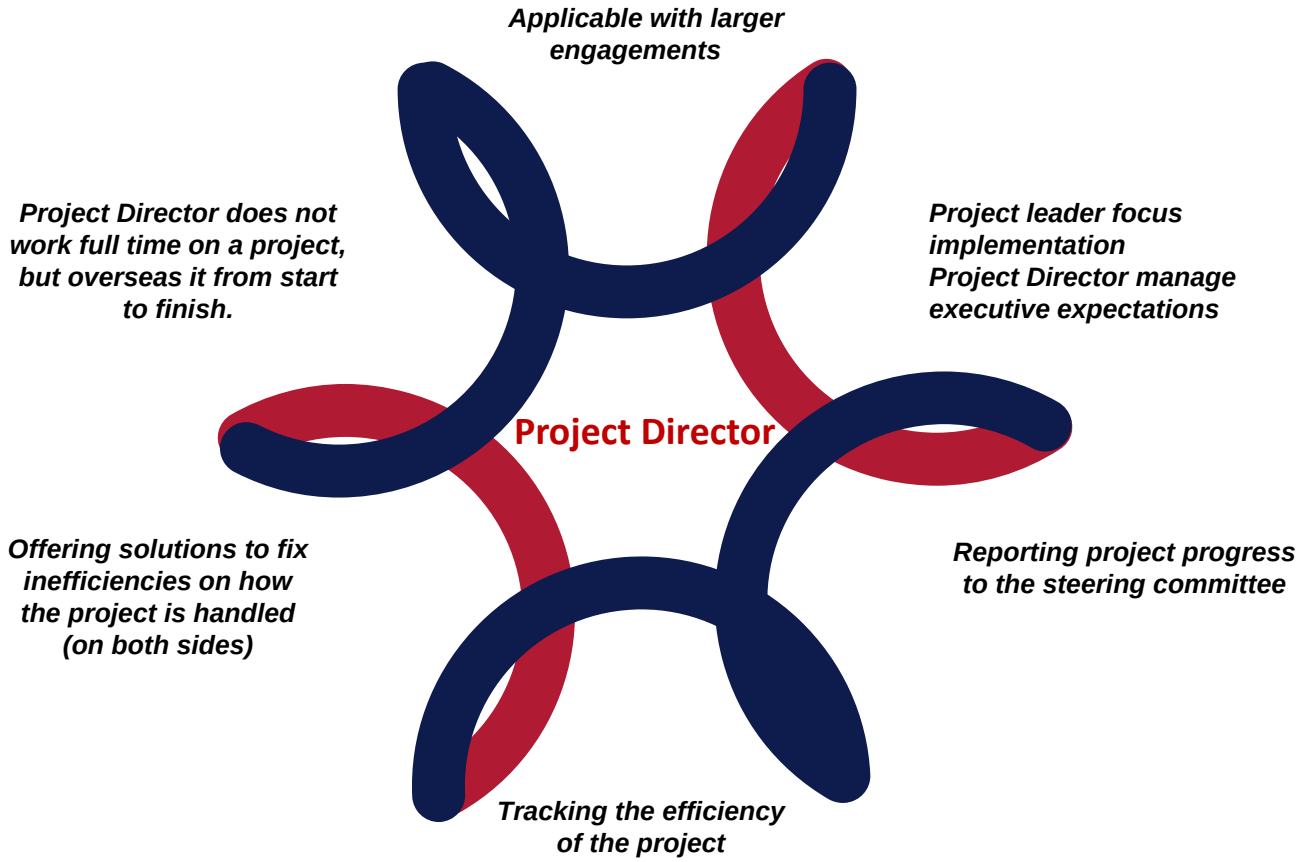
Critical Roles & Responsibilities

Project Director

Keep decision makers informed and committed to the project.
Smaller projects, this role is usually done by the Project Leader directly.



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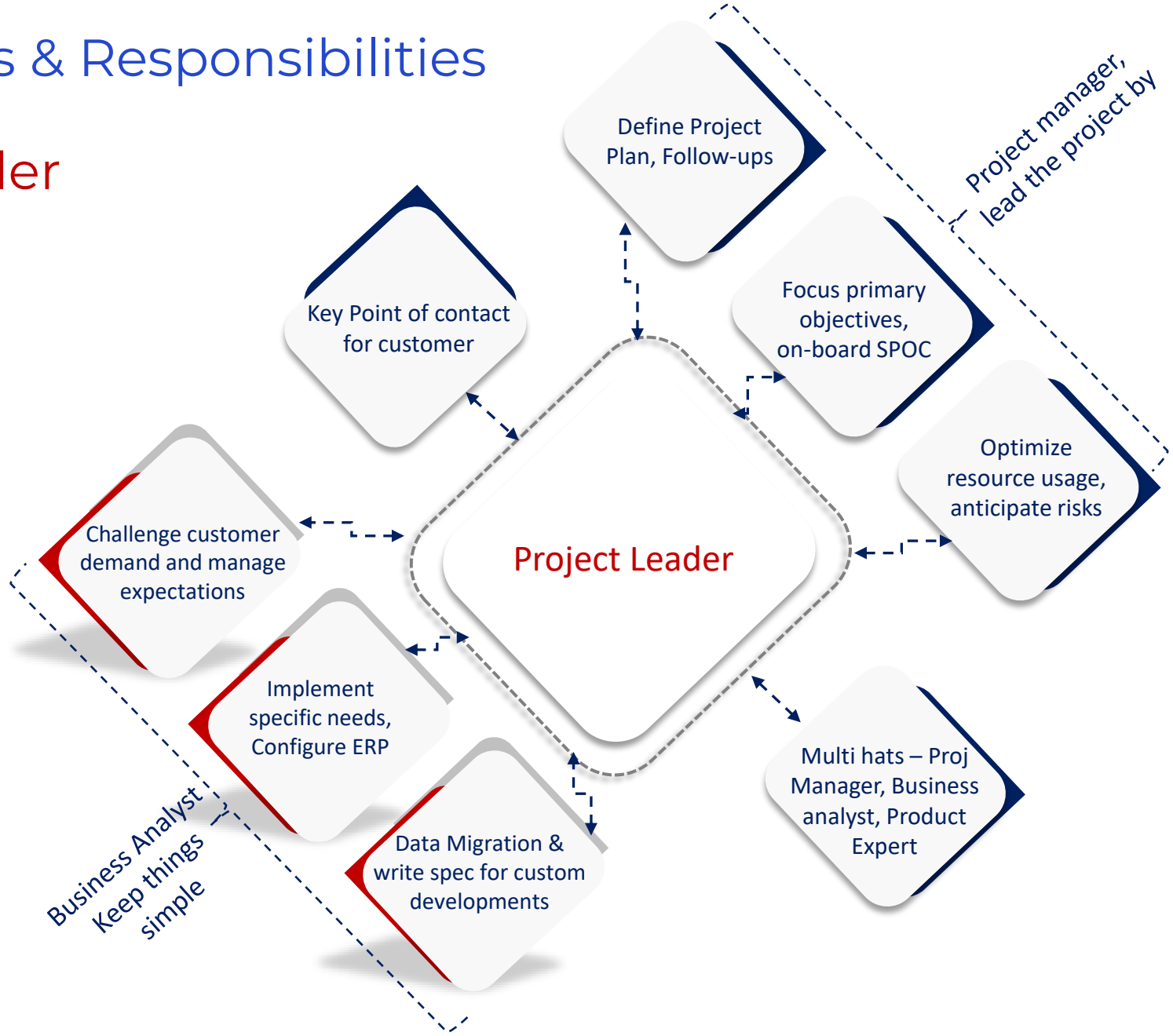
Critical Roles & Responsibilities

Project Leader



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Critical Roles & Responsibilities

ERP Solution Expert | ERP Developer | Customer SPoC

The most knowledgeable person of the key modules ((Finance, Inventory, Marketing, Manufacturing, Website) plays the role of ERP Solution Expert.

Perform peer reviews, working across all projects of the company

Review ROI analyses. Provide smart solutions on standard.

challenging the “Must Have”/”Nice to Have” or phasing split

Solution Expert

Assist business analysts with complex issues. Reduce custom development in projects

We don’t develop things that are not really necessary.

The App Experts are not part of the project

ERP Developer

- ✓ Mostly, ERP out-of-the box process are leveraged.
- ✓ ERP developer is involved if business requires development

Customer SPoC works closely with the ERP Project Leader

- Bilateral follow-ups
- Ambassador who convince the end-users (Change Management)

- Ensuring project plan aligns with the company’s agenda and constraints
- SPoC has a 360° understanding of the project requirements

Customer SpoC

- Gathering and assessing project requirements
- Training the end-users
- Internal ERP expert ensures first level of support for users

- SPoC to get involved in every step of the project
- Have the authority to make decisions

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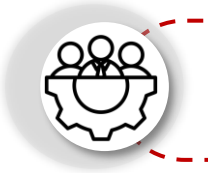
Critical Roles & Responsibilities

Customer – Extra roles



Steering committee

- Composed of customer's decision makers and ERP Project Director
- Decides on the project’s priorities, methodologies, and tracks the success of the project

Key Users

- Experts of specific domain and will help the SPoC to define the requirements.
- Test and validate deliverables

Sponsors

- Pays for the project and has high level objectives.
- Usually part of the Steering Committee

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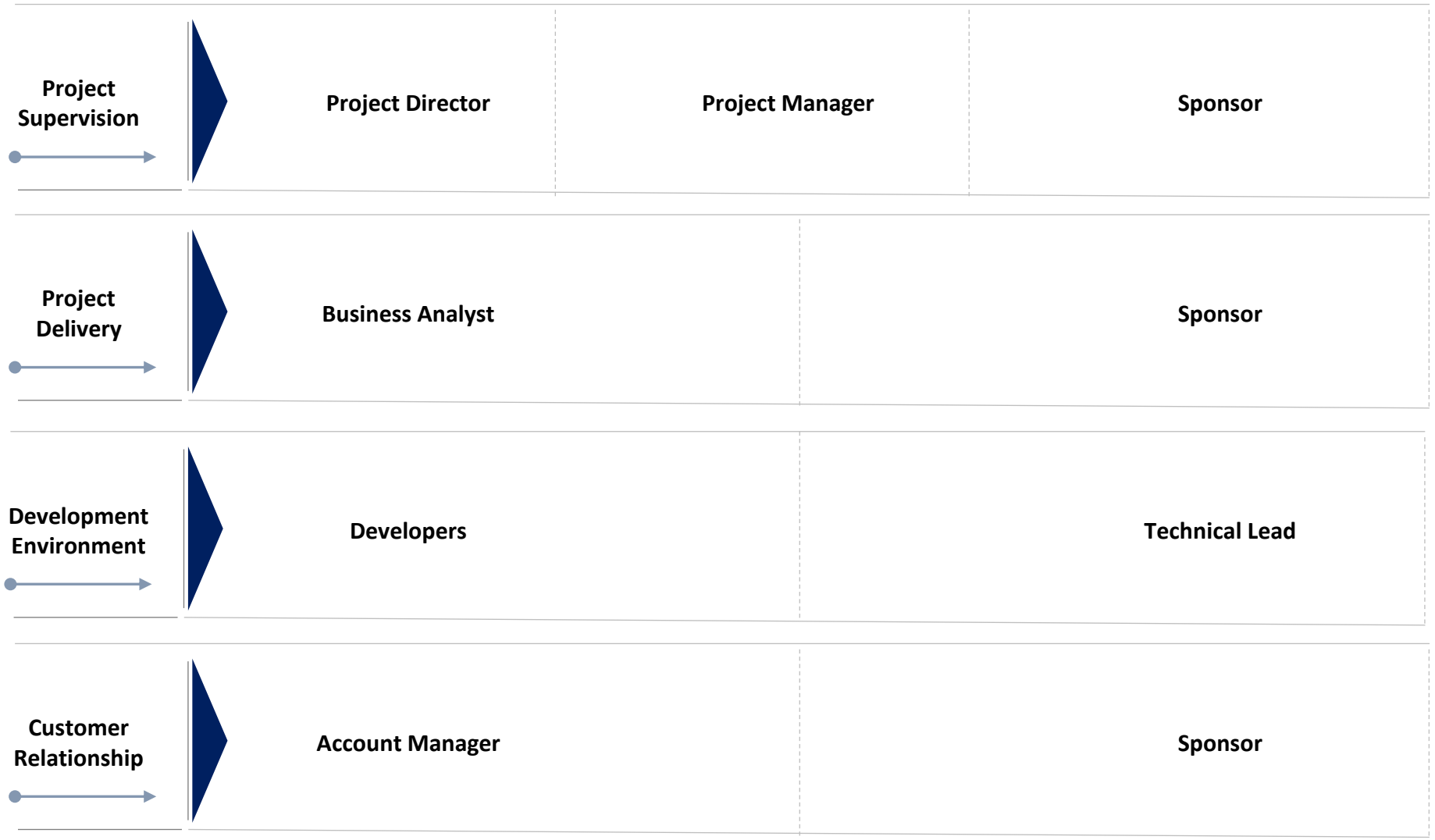
Project Organization



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Phases of Implementation - Phases

ROI & Gap Analysis

Project Kick-Off

Implementation

Go-Live

Support

Next Deployment

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Phases of Implementation – Phases | Time

Phase	Time	Goals
ROI Analysis	10%	ROI analysis, phasing & budget
Kick-Off	5%	Align stakeholders on methodology + standard training.
Implementation	80%	Series of cycles: analysis, development, validation, key-user training.
Go-Live	5%	End-user training, bug fixes.
Support	Variable	Depends on Scope, complexity & readiness
Second deployment	Variable	Broaden scope or add custom features.

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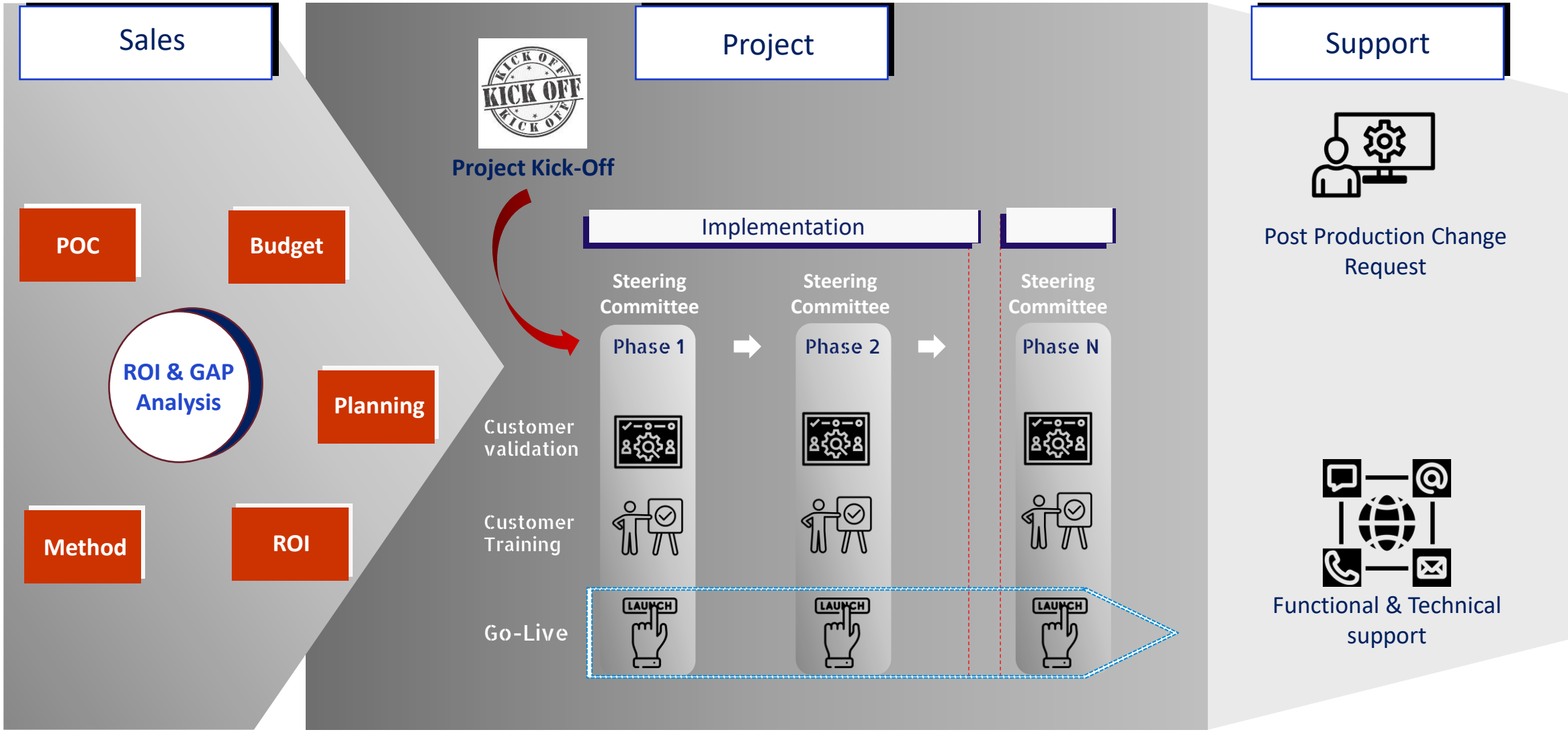
Classic Project trajectory



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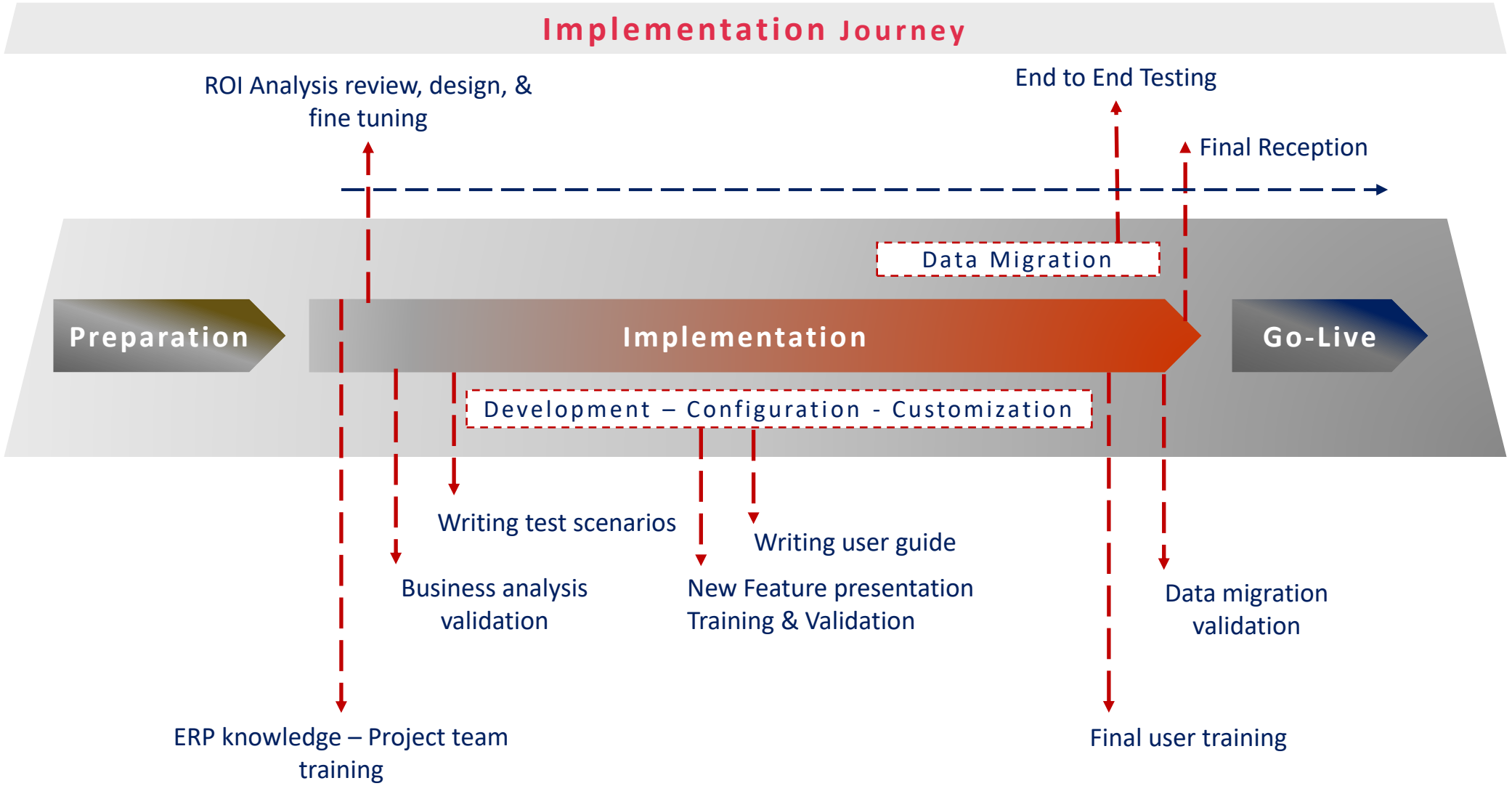
Implementation



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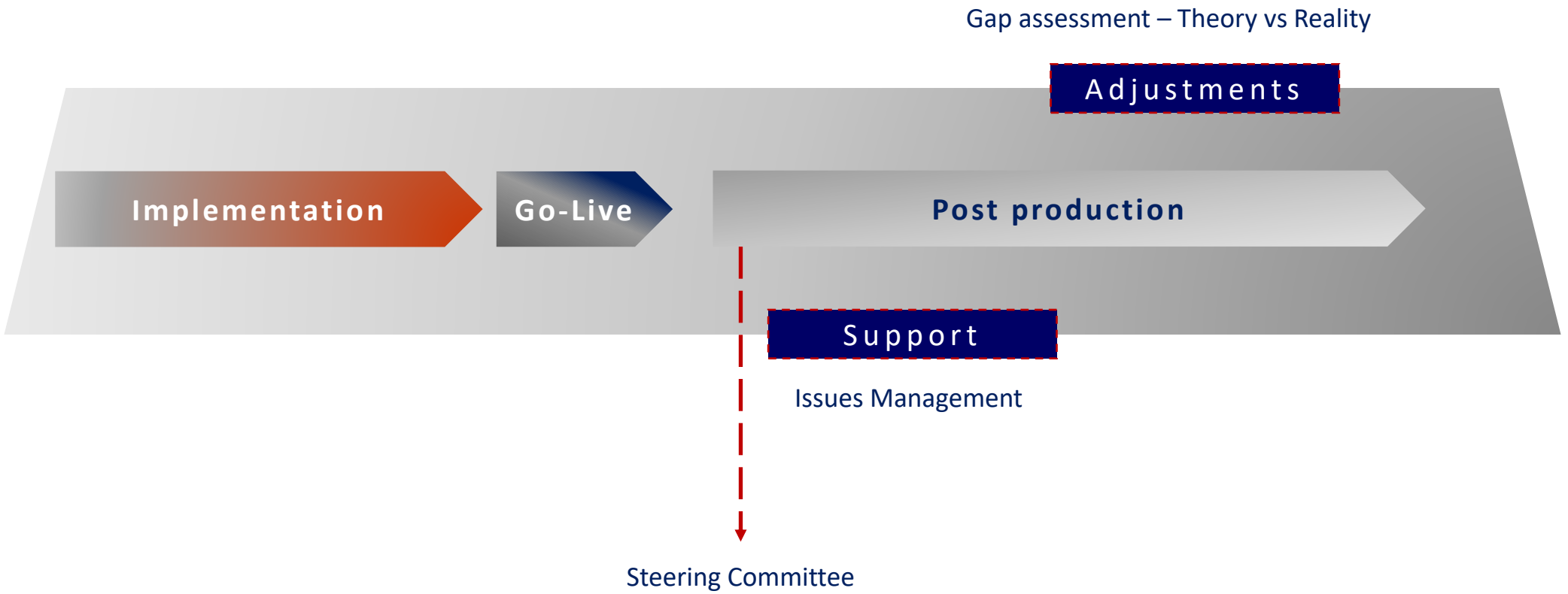
Go-Live & Post production Journey



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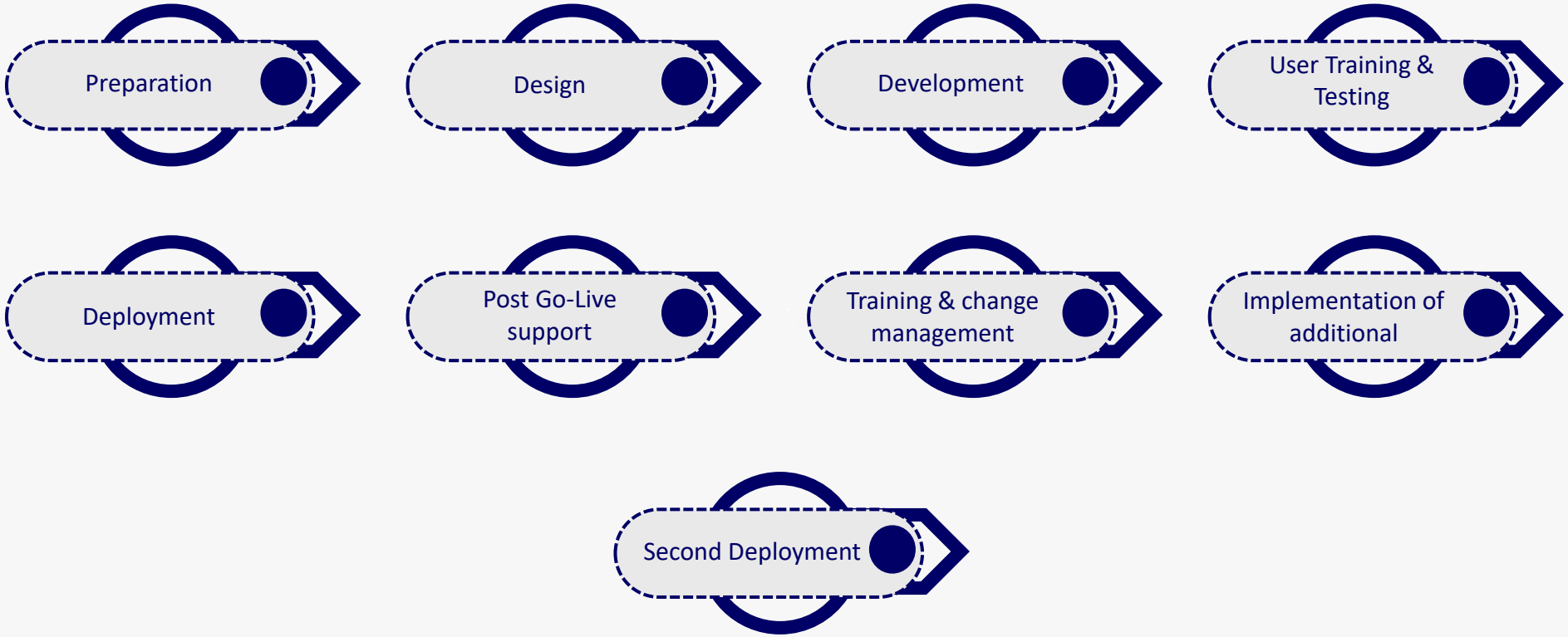
Implementation Phases - Detailed



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Phases of the Implementation (1)

•Preparation

- **Project Kickoff**
  - Officially start the project with a kickoff meeting that includes all key stakeholders.
  - Discuss the project scope, objectives, timeline, roles, and responsibilities.
  - Establish communication protocols and project governance structures.
- **Initial Planning**
  - Develop a detailed project plan outlining the tasks, milestones, and resources required.
  - Identify potential risks and develop mitigation strategies.
  - Define success criteria and key performance indicators (KPIs) to measure project success.
- **Requirement Gathering**
  - Conduct workshops and meetings with the customer to gather detailed business requirements.
  - Document current processes and identify areas for improvement.
  - Prioritize requirements based on their importance and feasibility within the project scope.

•Design

- **Solution Design**
  - Create a high-level solution design that outlines how Odoo will be configured and customized to meet the customer's requirements.
  - Define the system architecture, including integrations with other systems and data migration strategies.
  - Review the solution design with the customer to ensure it aligns with their expectations and business goals.
- **Prototyping**
  - Develop a prototype of the proposed solution to demonstrate key functionalities and configurations.
  - Use the prototype to validate assumptions, gather feedback, and make necessary adjustments before full-scale implementation.
  - Involve key users in the prototyping phase to ensure the solution meets their needs and is user-friendly.

•Development

- **Configuration**
  - Configure Odoo's standard modules and features according to the solution design and customer requirements.
  - Set up user roles, permissions, and workflows to align with the customer's business processes.
  - Perform initial testing to ensure configurations work as expected.
- **Customization**
  - Develop custom modules and features where necessary to address specific customer needs that cannot be met with standard configurations.
  - Ensure customizations are well-documented, thoroughly tested, and integrated seamlessly with the standard solution.
  - Minimize custom developments to reduce complexity and future maintenance challenges.
- **Data Migration**
  - Plan and execute the migration of data from the customer's existing systems to Odoo.
  - Ensure data is cleaned, transformed, and validated to maintain accuracy and integrity.
  - Conduct thorough testing of the migrated data to ensure it is correctly imported and functional in the new system.

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Phases of the Implementation – (2)

•Training & Testing

- **Unit Testing**
  - Perform unit testing on individual components and modules to ensure they function correctly in isolation.
  - Identify and resolve any issues at this early stage to avoid problems later in the project.
- **Integration Testing**
  - Test the integration of different modules and systems to ensure they work together seamlessly.
  - Validate data flows, workflows, and business processes to ensure they operate as intended.
- **User Acceptance Testing (UAT)**
  - Involve key users in testing the complete solution to ensure it meets their needs and expectations.
  - Gather feedback, identify any issues, and make necessary adjustments before the final deployment.
  - Obtain formal approval from the customer to proceed with the go-live phase.

•Deployment

- **Go-Live Preparation**
  - Prepare for the go-live event by finalizing configurations, completing data migration, and performing final tests.
  - Develop a detailed go-live plan, including a timeline, key activities, and roles and responsibilities.
  - Communicate the go-live plan to all stakeholders and ensure they are prepared for the transition.
  - **Final Preparation**

    Migrate data from legacy systems, ensuring accuracy and completeness.
    Set up production environment, ensuring all configurations and customizations are correctly deployed.
    Conduct final checks to confirm system readiness, including performance and security testing
  - **Training:**

    Provide comprehensive training to end-users, focusing on key functionalities and workflows.
    Offer role-specific training sessions to ensure users are confident in their tasks.
    Develop and distribute training materials, including manuals, videos, and FAQs.
- **Go-Live**
  - Execute the go-live plan, transitioning from the old system to Odoo.
  - Monitor the system closely during the initial period to ensure it operates smoothly and address any issues promptly.
  - Provide immediate support to users to help them adapt to the new system and resolve any questions or problems.
  - **Support during Transition:**

    Establish a support team to assist users during the initial period after Go-Live.
    Monitor system performance and user feedback, addressing issues promptly.
    Schedule regular check-ins with the client to ensure smooth adoption and resolve any concerns

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Phases of the Implementation – (3)

•Post-Go-Live Support

- **Stabilization**
  - Focus on stabilizing the system by addressing any post-go-live issues and ensuring it operates reliably.
  - Provide intensive support during this period to help users adapt and ensure business processes run smoothly.
  - Monitor system performance and make necessary adjustments to optimize functionality.
- **Continuous Improvement**
  - Engage in continuous improvement by gathering feedback from users and making enhancements to the system.
  - Identify opportunities for additional features, optimizations, and process improvements.
  - Maintain regular communication with the customer to ensure ongoing satisfaction and address any evolving needs.

•Training & Change Management

- **User Training**
  - Develop comprehensive training programs to ensure users are proficient with Odoo and can perform their tasks effectively.
  - Offer various training methods, including workshops, online tutorials, and documentation, to accommodate different learning preferences.
  - Provide ongoing training and refreshers as needed to keep users up-to-date with new features and best practices.
- **Change Management**
  - Implement change management strategies to facilitate the transition to the new system and minimize resistance.
  - Communicate the benefits of the new system and involve users in the implementation process to build buy-in.
  - Provide support and resources to help users adapt to the new workflows and processes.

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Implementation Phases (4)

•Second Deployment:

•Post Go-Live Adjustments:

- **Fine-tuning Configuration:**
  - Adjust configurations based on initial user feedback and performance data.
  - Optimize workflows to enhance efficiency and user satisfaction.
- **Bug Fixes and Enhancements:**
  - Identify and resolve any post-Go-Live issues that were not detected during testing.
  - Implement minor enhancements to improve functionality and user experience.
- **Performance Optimization:**
  - Monitor system performance and make necessary adjustments to ensure optimal operation.
  - Conduct regular performance reviews and address any bottlenecks or slowdowns.

•Additional Features:

- **Module Expansion:**
  - Introduce additional Odoo modules that were not part of the initial deployment, based on evolving business needs.
  - Customize and configure new modules to integrate seamlessly with the existing setup.
- **User Training for New Features:**
  - Provide targeted training sessions for new features or modules to ensure users are well-prepared.
  - Update training materials and documentation to include information about the new features.
- **Feedback Loop:**
  - Establish a continuous feedback loop with users to gather insights on new features and make iterative improvements.
  - Encourage open communication to identify potential areas for further enhancements.

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Progress Tracking

PROGRESS REPORT

- Updated Regularly

REGULAR UPDATES

- Scheduled Reporting
- Status Meetings

TRACKING MILESTONES

- Milestone Definition
- Performance Metrics
- Consistent Improvements

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Progress tracking

•Progress Report:

•Regular Updates:

- **Scheduled Reporting:**
  - Establish a schedule for regular progress reports, including weekly or bi-weekly updates.
  - Share reports with key stakeholders, highlighting achievements, challenges, and upcoming milestones.
- **Status Meetings:**
  - Conduct regular status meetings with the project team and client to discuss progress and address any concerns.
  - Use these meetings to align on priorities and make informed decisions on next steps.

•Tracking Milestones:

- **Milestone Definition:**
  - Define clear milestones for the project, including critical phases such as initial deployment, user training, and post-Go-Live adjustments.
  - Ensure each milestone has specific, measurable objectives and timelines.
- **Performance Metrics:**
  - Use key performance indicators (KPIs) to measure progress and success against defined milestones.
  - Track metrics such as user adoption rates, system performance, issue resolution time, and overall user satisfaction.
- **Continuous Improvement:**
  - Analyze progress data to identify areas for improvement and make necessary adjustments to the project plan.
  - Foster a culture of continuous improvement, encouraging the project team to learn from each phase and apply lessons learned to future deployments.

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