

HOW TO SUCCESSFULLY

PREPARE YOUR AEC FIRM FOR AN ERP PROJECT



TABLE OF CONTENTS

I. Introduction	3
II. So, You Think You Need an ERP Solution.	3
III. Don't Get Caught in the Trap	5
IV. Where to Get Started	6
V. Question 1: Why Are You Doing This?	8
A. Symptoms Group 1	9
B. Symptoms Group 2	10
C. Symptoms Group 3	11
D. Symptoms Group 4	12
E. Symptoms Group 5	13
VI. Question 2: What Are Your Goals?	15
VII. Question 3: Who is Involved?	18
VIII. Question 4: When Do You Want to Do This?	25
IX. Question 5: Where Do You Go Next?	33
X. Conclusion	34
XI. Have A Question?	35
XII. About BST Global.	36

SO, YOU THINK YOU NEED AN ERP SOLUTION – BUT DO YOU KNOW WHERE TO START?

Have you ever thought to yourself: “We’re having a number of issues with our performance right now, and we’ve got to do something about it.” Or, “Our processes are too complex, which makes it difficult for our employees to do their job efficiently.” Well, you’re not alone.

Many firms in the architecture, engineering, and environmental consulting (AEC) industry start out with these same concerns – and they all tend to come to the same conclusion: we need an enterprise resource planning (ERP) solution. And then just like that – they investigate their options, invest in an ERP system, implement it, and all their problems go away!

... If only it were that easy.

What is easy, is for firms to start with this notion of “We need an ERP solution!” But it’s also the point where many firms find it just as easy to stop. Why? Because the real challenge isn’t recognizing the need for an ERP solution, it’s knowing where, or how, to even start.

So, what do these AEC firms do? They jump into the evaluation process with limited preparation or planning, which is a huge no-no for ERP implementation success.

But you don’t have to be one of those firms.



This worksheet, *How to Successfully Prepare Your AEC Firm for an ERP Project*, is here to help you do an internal assessment of your firm and successfully prepare you for this process. Going through this worksheet with your team will help you all get on the same page regarding your ERP project, so you're ready to respond to your Executive Team when you pitch them. Assuming they approve the project, this document will then serve as a framework to begin the conversation with potential solution providers later on.

This worksheet covers the following questions:

- **WHY** ARE YOU DOING THIS?
- **WHAT** ARE YOUR GOALS?
- **WHO** IS INVOLVED?
- **WHEN** DO YOU WANT TO DO THIS?
- **WHERE** DO YOU GO NEXT?

Think of it as your guide to the first step in your ERP journey.

By analyzing your firm's current situation, you'll have the insight you need to properly communicate what you're looking for in an ERP solution – and the clearer you can be in your requirements, the better you can expect the end result to be. We'll ask you a series of questions and provide some insights along the way, to help you through this introspective process from start to finish.



DON'T GET CAUGHT IN THE TRAP

At the end of the day, we know that starting an ERP project is a difficult task because it's such a big decision for executives to make – which is all the more reason to be strategic about how you present your firm's need to implement an ERP solution. If you can't properly explain and support how you came to the conclusion that you need an ERP solution, and clearly demonstrate that need to decision makers, it will be difficult to get your ERP project to move forward.

So, whether you're intimidated by the process or are unfamiliar with it, we're going to help you avoid getting caught in the trap that many AEC firms find themselves in: they don't start the project, because they don't know where to begin. And if they do somehow get the buy-in they need without this step, they're not ready to take on an ERP project properly. Either way, it's a lose-lose situation for the project and the business.

You're here because you see the need for an ERP solution in your firm, and now this is your opportunity to help make that change happen. No more putting off this initiative or searching online for "how to start an ERP project."

This worksheet is your solution to getting your team organized and taking the first step towards an ERP project that can provide the transformation your business needs.

**SO, CALL A MEETING
AND GET YOUR TEAM
TOGETHER - IT'S TIME
TO KICK THIS OFF!**



WHERE TO GET STARTED

How you approach this step of preparing your firm for the evaluation of different providers and a future implementation, will be a significant determinant of the success or failure of your ERP project.

But instead of just telling you what to do – we're going to show you how and why to do it based on our experience with completing hundreds of ERP implementations for AEC firms globally. Our goal is to leave no stone unturned, so you can be confident that your team has the information necessary to make this initiative successful.



Here's a look at how we've laid out this worksheet:

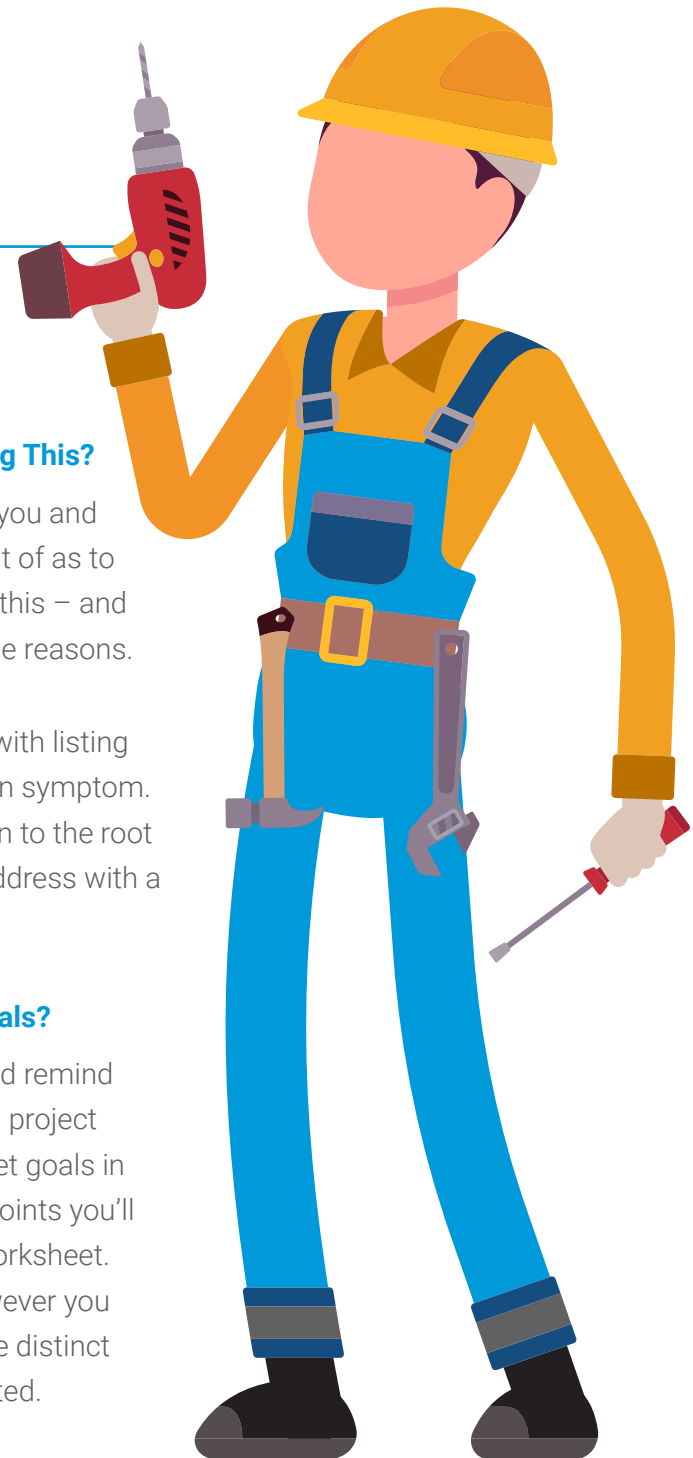
Question 1: Why Are You Doing This?

There may be several reasons you and your team have already thought of as to why your firm should be doing this – and now it's time to document those reasons.

But we won't let you get away with listing symptom, upon symptom, upon symptom. We're here to help you get down to the root problems your firm needs to address with a new ERP solution.

Question 2: What Are Your Goals?

To keep the project on track and remind your team why you started this project in the first place, you need to set goals in advance – based on the pain points you'll identify in Question 1 of this worksheet. These goals can be set up however you would like, but we created three distinct categories to help you get started.



Question 3: Who Is Involved?

One of the most important things to note in this section is that many firms make the mistake of starting the ERP project planning process with the Finance team at the forefront – without involving the Operations team. We'll explain the importance of why this approach needs to be reworked in order to make your ERP project successful.

Then, you'll need to think through the key roles involved in the ERP selection process, who you'll need buy-in from, and who's going to take the lead on this project.

Question 4: When Do You Want to Do This?

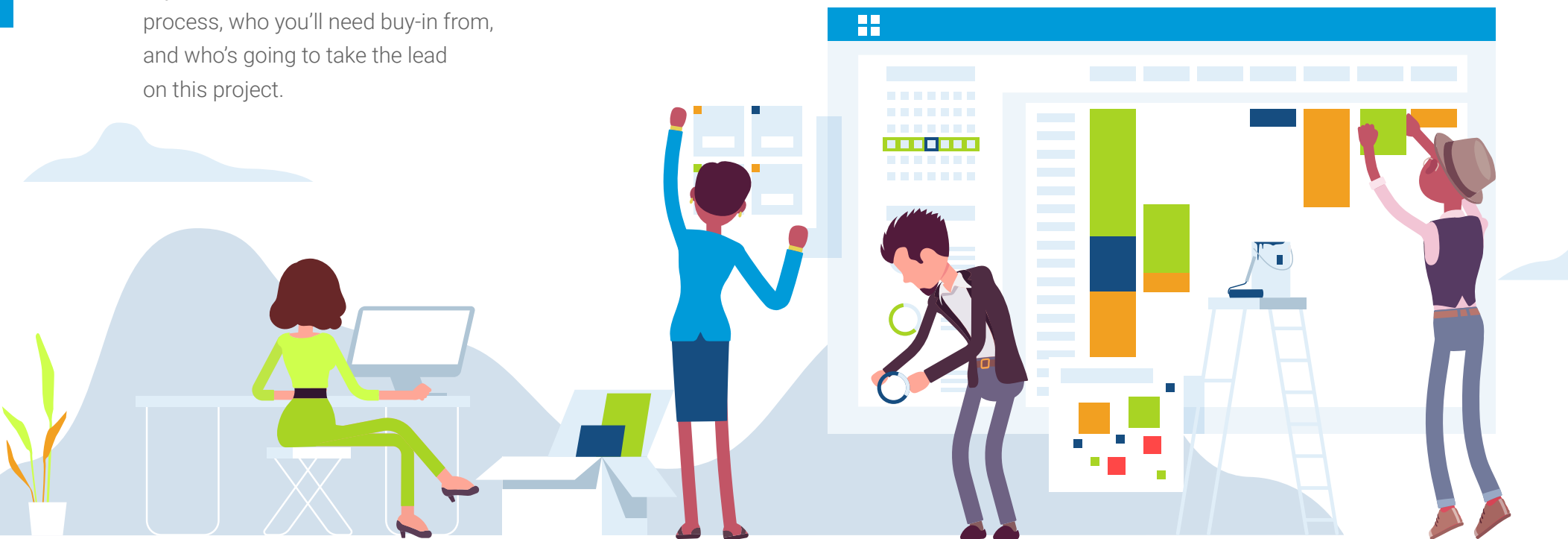
In order to determine a potential date to start the ERP project, there are a series of items that need to be considered.

Whether it's competing events or projects, important meetings, different characteristics of your firm (e.g. size, number of offices, etc.), or other important factors, this section is critical for ERP project effectiveness.

Question 5: Where Do You Go Next?

When you've made it to this point, your team will officially have what it needs to take the next step in your ERP journey.

See? Nothing to be afraid of. Now it's up to you, and your team, to make this happen. You can do it!



QUESTION 1:

WHY ARE YOU DOING THIS?

To start off this worksheet – the first thing you’ll want to ask internally is “Why?” Why are you considering implementing an ERP solution?

While at this point you may have a running list in your head of reasons why, that won’t get the process very far. What you want to do is take the time to start examining those reasons, and then document them.

When analyzing those reasons with your team, it’s important to address what are actual problems, rather than symptoms of those problems.

Here’s what we mean:

A symptom is something that happens as a result of a problem – it’s not the problem itself.

The thing is, you could come up with 20, maybe even 50, symptoms – and while at first glance they may seem like they’re all problems to your firm, most likely, not all of them actually are.

And if you focus on fixing all of those symptoms, without getting down to the root cause instead, then there’s a greater chance those symptoms will continue to pop up. But if you get down to a set of real problems and allocate your firm’s resources toward fixing those, then the related symptoms should improve as a result.

To get the most out of this worksheet, be sure your team is focusing on taking this section by section, without rushing through it. This is not meant to be an individual effort, working on this exercise together will not only help make the process less overwhelming, but it will also provide a more effective result for your firm.

A quick note: certain symptoms can be caused by multiple problems, so don’t worry if you notice some symptoms overlapping.

LET’S GET STARTED.

DIRECTIONS:

Go through each group of symptoms and check off the ones your firm is currently experiencing. Once you're done reviewing the list of symptoms, go to the bottom of the page to find out what the possible root problem is.

SYMPTOMS GROUP 1

Is your firm experiencing any of the following symptoms? Check if yes, leave blank if no.

_____ We do not have the ability to properly analyze past project performance to assess risk for new projects.

_____ We cannot easily see profitability for all of our projects, departments, offices, and companies.

_____ Employees are not able to see and manage their work assignments.

_____ Project Managers do not know when their projects start to run over budget.

_____ We do not have the correct information to balance the workload among all staff in order to maximize overall utilization.

_____ We have a number of software applications that process the same data but are not integrated with each other.

_____ Project Managers have to enter the same amount of data to initiate a project regardless of its size.

POTENTIAL PROBLEM: YOUR CURRENT SYSTEMS

If you checked off any of these symptoms, then your firm may have a problem with its current system(s). Whether you have an outdated software solution that no longer meets your firm's business needs, or you've got multiple systems that seem to

make work harder (not easier) for your team – it's causing you to face a variety of operational issues, all of which can cause a major hindrance to your firm's future success.

SYMPTOMS GROUP 2

Is your firm experiencing any of the following symptoms? Check if yes, leave blank if no.

_____ It is overly expensive to get the proper help to support the use of our ERP system.

_____ Our ERP system has not kept pace with AEC industry advances and requirements.

_____ When contacting our vendor's support team, they do not quickly understand what we are asking about.

_____ When contacting our vendor's support team, they do not respond in a timely manner.

_____ We have to pay software license fees when upgrading to a new version of our ERP solution..

_____ Our software provider does not feel like a "partner" to us.

POTENTIAL PROBLEM: YOUR VENDOR

If you checked off any of these symptoms, then your firm might have a problem with its current system provider. And relying on support that's unreliable doesn't make a whole lot of sense, does it?

With any system, you want a support team that is there when you need them – even more so if it's a complex ERP system. Simply put: a vendor that cannot provide the support your firm needs, is not a firm you want to partner with.

SYMPTOMS GROUP 3

Is your firm experiencing any of the following symptoms? Check if yes, leave blank if no.

_____ We cannot get a timely view of our firm's operational performance.

_____ Our Project Managers are not able to see employees' charges to projects.

_____ Our Project Managers do not have the visibility they need to proactively manage the performance of a project.

_____ The WIP portion of our Days Sales Outstanding is older than 30 days.

_____ We spend too much effort adjusting erroneous labor charges that require a transfer to another project.

_____ Our month end reporting is delayed because we have difficulty getting percent complete and project progress information from Project Managers.

POTENTIAL PROBLEM: YOUR INTERNAL PROCESSES

If you checked off any of these symptoms, then it seems your team is having a problem with its internal processes – meaning they can't get the relevant information they need, when they need it.

This can have a serious domino effect on your firm as it makes it difficult for them to perform key processes in a timely manner. And if you can't get those processes done efficiently, then it takes longer to complete projects – which is the entire basis of your business.

SYMPTOMS GROUP 4

Is your firm experiencing any of the following symptoms? Check if yes, leave blank if no.

_____ Our firm suffers from sub-standard labor utilization rates.

_____ We do not have accurate past project information that can be used as a basis to negotiate fees for new projects.

_____ Many of our projects continually run over budget, impacting project profitability.

_____ Our firm is unable to meet the financial targets and goals that we set.

_____ Cash flow issues restrict the ability to invest in our firm and grow.

POTENTIAL PROBLEM: YOUR BUSINESS PERFORMANCE

If you checked off any of these symptoms, then your firm seems to have a problem realizing its goals. Not meeting key performance indicators is one of the biggest issues your firm

can have, because when performance starts to slump, the ability to grow and expand lessens. And if your firm isn't growing, that means it's stagnant – which is the last thing any business wants.

SYMPTOMS GROUP 5

Is your firm experiencing any of the following symptoms? Check if yes, leave blank if no.

_____ For the most part, our firm is unable to complete projects on time.

_____ Our clients do not value the services we provide.

_____ We do not get a lot of repeat business from our clients.

_____ We have lost one or more of our major clients in the last few years.

_____ Most of our clients are unable to act as a good reference for our firm.

_____ Clients do not pay us on time.

POTENTIAL PROBLEM: CLIENT SATISFACTION

If you checked off any of these symptoms, then it sounds like your firm may have some relationship challenges with its clients. This dissatisfaction among your clients may be a result of other problems your firm is facing (e.g. inefficient internal processes, vendor relationship issues, etc.).

In which case, you may need to address those issues first, so you can improve your services and develop a healthier relationship with your client base.

Check each problem (not symptom!) you got a “Yes” for here:

- ☐ 1. YOUR CURRENT SYSTEMS
- ☐ 2. YOUR VENDOR
- ☐ 3. YOUR INTERNAL PROCESSES
- ☐ 4. YOUR BUSINESS PERFORMANCE
- ☐ 5. CLIENT SATISFACTION

Now you’ve got your “Why” – your handful of key issues that are propelling this ERP initiative. Analyzing your firm’s internal symptoms and problems gives your Executive Team a clear picture of why your firm needs to begin the journey of searching for a new ERP software solution.

You no longer have a series of symptoms swirling around, but real problems that your team can address and eventually overcome with the support of an ERP solution.

What you’ll want to do next, is use these primary problem areas to help guide your team in determining what you want to achieve with a new solution.

Experiencing a symptom we didn’t mention above? Add it here:

- _____
- _____
- _____
- _____
- _____

- _____
- _____
- _____
- _____
- _____

QUESTION 2:

WHAT ARE YOUR GOALS?

As your organization considers the addition or replacement of an ERP system, it's important to drive this process with a desired goal in mind. This is the time to set aside any preconceptions about vendors or systems you, or your team, may have outside of a formal evaluation process.

Instead, you'll want to focus on coming up with a common set of organizational goals that must be attained for a new ERP system to be successful, or for it to be worth your firm's investment. To have a goal-based approach for this process, and to have the ability to test the results of this initiative, means there needs to be clear and measurable objectives stated at the beginning.

The first step is for your team to establish what success looks like from various perspectives. To do this, you should work with your firm's key stakeholders to create a set of foundational expectations based on current business pains (the business pains you identified with your team in Question 1). This is a valuable step

as each key stakeholder will bring their own unique perspective to the table.

When you move to the evaluation stage of your ERP project (after you've completed this worksheet), you can then leverage these foundational goals to level set each candidate and ensure that all the decisions your team makes tie back to what inspired the project from the start.

Now it's time to think about what you need the evaluation process to accomplish, what issues you need to resolve, and ultimately, what you need an ERP solution to deliver.



Check the goals that apply to your firm.

OUR GOALS ARE TO...

Growth:

- _____ Grow organically
- _____ Expand the business globally (currencies, taxes, etc.)
- _____ Have a system that supports acquisitions (platform for growth)
- _____ Have a system that is intuitive for faster onboarding of new employees
- _____ Have a system that can be scalable technically (Cloud/SaaS)
- _____ Have a system that supports global resource management and sharing
- _____ Have a system that can visually display backlog by region/discipline
- _____ Have a system that supports multiple office locations (virtual collaboration)
- _____ Improve geographic project management

Efficiency:

- _____ Have a system that automates administrative work
- _____ Have a system with online workflows that give employees the ability to know what to do without a large amount of overhead
- _____ Improve service communication and collaboration
- _____ Enable our Project Managers to be more technically focused with their time so their indirect time on the project is minimized
- _____ Have a system that provides consolidated reporting and visibility across all work
- _____ Reduce service delivery costs
- _____ Improve time and expense processing
- _____ Improve project scheduling
- _____ Reduce the number of systems used in service delivery
- _____ Improve visibility to available staff by their skill and geography (skill matching)
- _____ Have a system that accelerates the billing process with online collaboration across a large Project Management community

Check the goals that apply to your firm.

OUR GOALS ARE TO...

Performance:

- _____ Enhance visibility into project performance and backlog
- _____ Improve resource sharing across departments
- _____ Have a system that identifies skill gaps and surpluses
- _____ Have a system that eases the management of subcontractors
- _____ Have a system that improves our utilization forecast
- _____ Increase client satisfaction
- _____ Utilize standard delivery methodologies and best practices
- _____ Increase resource utilization
- _____ Improve project quality
- _____ Improve service pricing
- _____ Reduce revenue leakage (e.g. time not charged, variances, write-offs, etc.)

Have a goal we didn't mention yet? Add it here:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Once you've documented the goals for your new ERP solution, the next step is to identify the individuals your team needs to make this ERP initiative happen, so your firm can eventually achieve those desired goals.

QUESTION 3:

WHO IS INVOLVED?

Many times, AEC firms' ERP journey begins with their Finance team saying, "We need a new Accounting system," and then once the implementation is complete, it's "Here you go Operations team, this is the new system you have to learn to use." While this is a common approach, we want to caution you against going down this path.

Time and time again, we have seen firms run into a plethora of issues by starting the conversation with Finance and leaving the Operations team out until the end.

AT A MINIMUM, FINANCE AND OPERATIONS SHOULD BE WORKING HAND IN HAND TO SELECT THE BEST ERP SOLUTION TO MEET YOUR AEC FIRM'S NEEDS.

You wouldn't expect your Operations Manager to select Accounting software, as they wouldn't understand the statutory and regulatory compliance issues the Accounting team faces regularly. The same holds true for your Accounting team, they're not the best suited to select the tools that will help Operations meet their goals.

The bottom line is this: both teams need to work together to come up with a comprehensive requirements list that will drive the ERP selection process.

Even though Finance and Operations are an essential part of the conversation, it's also important to identify those directly affected by a new ERP solution. Because ultimately, these are the people whose day-to-day activities will be impacted.

And keep in mind that there is no single solution that ticks all the boxes, so it's important to prioritize everyone's needs to find a solution that satisfies as many top priorities as possible.



Here is an example list of key roles where a new ERP solution could fundamentally change the way their job is done. Although these roles are not commonly involved in an ERP project, the impact on them should at least be considered.

Operations:

- Project Managers
- Operations Managers

Finance:

- Billers
- Controllers
- Accounts Receivable
- Accounts Payable
- Project Accountants

Information Technology:

- Database Administrator
- Systems Developers
- Information Systems Manager

Add other key roles in your firm that could be impacted by an ERP solution here:

- _____
- _____
- _____
- _____
- _____

Next, you'll want to identify from whom you need buy-in. Although many of these individuals may not be the ones necessarily writing the check, they need to at least be on board with the initiative to make it happen.

Here is an example list of individuals you will need support from to move forward with this initiative:

- Chief Executive Officer
- Operations Management
- Chief Financial Officer
- Chief Operations Officer
- Chief Information Officer /
Chief Technology Officer
- Administrative leaders

Add your own list of supporters here:

- _____
- _____
- _____
- _____
- _____



You've got your list of roles who will be impacted by an ERP solution, and your list of roles you need buy in from for the ERP project to move forward – but now that begs the question – who's in charge of the initiative? Enter the Project Sponsor.

The Project Sponsor is the individual with overall accountability for the ERP project and is primarily responsible for its success. Often times, this individual should be someone who has a senior position and is well-respected within the firm.

Without someone in this position as the Project Sponsor, it not only becomes difficult to keep an initiative of this magnitude on track, but it's also going to have a major impact on how readily accepted the new tool is once it's implemented firm wide. If you pick someone who doesn't have much influence, it's likely that your firm will face more challenges in successfully getting everyone on board.

So make sure you choose someone who can effectively champion this project and clearly communicate the importance of this change to the entire team.

Here is an example list of individuals that could sponsor this project:

- Operations Management
- IT Leadership
- Executive Leadership
- Finance Management

Write in your firm's potential Project Sponsors here:

- _____
- _____
- _____



Use this chart to help you keep track of the specific people in your firm that will potentially be involved in your evaluation process:

NAME	TITLE	Are they involved in the ERP selection process?		Will you need their buy-in?		Are they a potential Project Sponsor?	
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO
		YES	NO	YES	NO	YES	NO

After filling out this chart, does your firm have enough available staff to start this ERP project?

YES	NO
-----	----

If not, then you'll need to evaluate what additional resources are required to move forward.

Up until this point you've identified who needs to be part of your ERP software evaluation process. If after completing this worksheet you receive approval from your Executive Team for the ERP project and end up selecting an ERP solution, you'll need to identify a Project Manager to be in charge of the software implementation.

Although the Project Manager does not typically get involved until it's time for implementation, it's still a good idea to consider whether or not you want to involve them in your evaluation process as well.

Whether you decide to make them a full-on member of the evaluation team, or simply want to get their input at the beginning of the project, it's good to at least start thinking about who will take on this role since the ERP project will eventually be handed over to them.

Typically in AEC firms, the ERP implementation Project Manager is someone who already has a Project Manager role within the firm. When assessing your own internal pool of Project Managers, make sure you're not picking just "any" Project Manager with some free time on their hands.

Because this isn't just "any project" – this is likely the most important project your firm will ever do.

**AGAIN: THIS IS LIKELY
THE MOST IMPORTANT
PROJECT YOUR
FIRM WILL EVER DO.**

And since you want to select one of your top Project Managers for the job, it's likely they're already working on other important projects. So, to avoid disrupting any of those projects down the line, putting thought into this now and planning for it ahead of time will make the implementation process a lot easier on your team.

Choose your Project Manager however you see fit, but remember that the impact on your firm as a result of this ERP project has the potential to last a decade (or more) – so go to whatever lengths you need to make sure you get this selection right.

**Write in your firm's potential
Project Managers here:**

- _____
- _____
- _____

Once all these roles are accounted for, it's time to start thinking about when you and your team want to get this show on the road.

BUT BE CAUTIOUS - THIS ISN'T AS SIMPLE AS PICKING A START DATE AND RUNNING WITH IT.

Coming up with a realistic go-live date for your firm takes a lot of thoughtful planning to do it right. And although the next section won't help you select an exact go-live date for your firm (that's another process all on its own that you'll want to thoughtfully review with your ERP vendor once you select them), it goes over a list of must-have information to help you determine a date when your firm can realistically start the project.



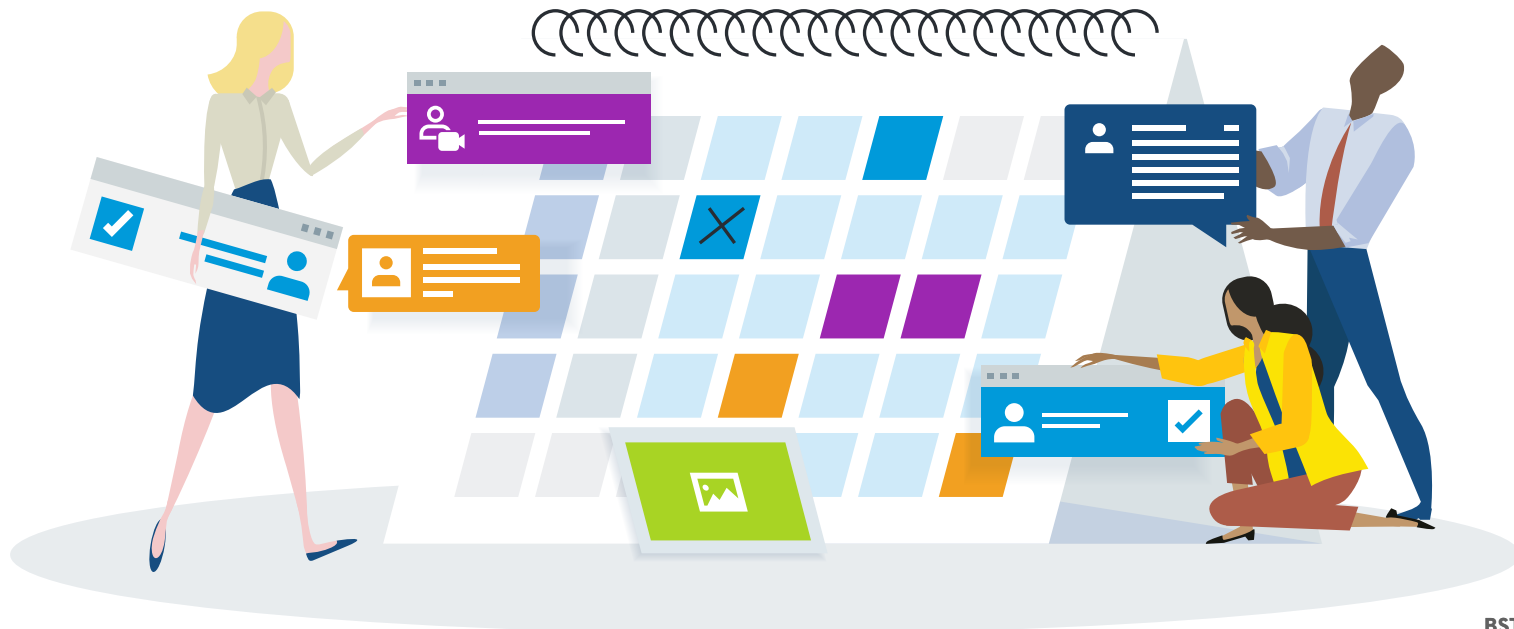
QUESTION 4:

WHEN DO YOU WANT TO DO THIS?

Coming up with a potential go-live date for your ERP solution will help your team decide when to start the evaluation process internally. To identify a realistic date that your firm would need to begin the ERP implementation process depends on a number of items – one of the most important being if there are any other competing events that will affect the ERP project.

Example list of competing events:

- Mergers and acquisitions
- Key personnel changes
- Financial audit
- Summer shut down
- Physical office relocation
- Human Resources/Payroll system replacement
- Vacation time



Write your own competing events below:

- _____
- _____
- _____
- _____
- _____

1. Do these competing events need to be completed before starting an ERP implementation, or can they run in parallel?

COMPETING EVENT	Can it run in parallel to the ERP implementation?		Must it be completed before the ERP implementation?	
	YES	NO	YES	NO
	YES	NO	YES	NO
	YES	NO	YES	NO
	YES	NO	YES	NO
	YES	NO	YES	NO
	YES	NO	YES	NO

2. Are the individuals you identified in Question 3 (Who is involved?) of this worksheet involved in any of these competing events?

YES	NO
-----	----

If yes, list who and the competing events that will impact their availability for the ERP project.

NAME	COMPETING EVENTS	DATES OF UNAVAILABILITY

Moving the implementation along with minimal disruptions is key. And by identifying these competing events, your team will know what to account for when assessing a project schedule and a go-live date with your potential ERP software provider.

ADDITIONAL QUESTIONS TO CONSIDER

- 1. Are there particularly slow or busy times in your business cycle you need to consider when scheduling the project? If so, list them.**

- _____
- _____
- _____

- 2. Do you need to have the implementation cost ready for next year's budget meeting?**

YES	NO
-----	----

- 3. If yes, then when is next year's budget meeting?**

Now that you've answered these questions internally, make sure your team keeps this in mind:

An ERP implementation is typically a very involved process for any AEC firm – no matter how big or small.

Because it's so involved, one of the most detrimental things you can do is try to artificially compress the project schedule. When we see firms do this, while it may make for a short-term gain, that short-term gain is always offset by an organization that is undertrained and unprepared for this amount of change.

When creating an ERP project schedule, an important factor to include is your firm's formal RFI and RFP process – if it has one.

4. Does your organization require a formal RFI and RFP process?

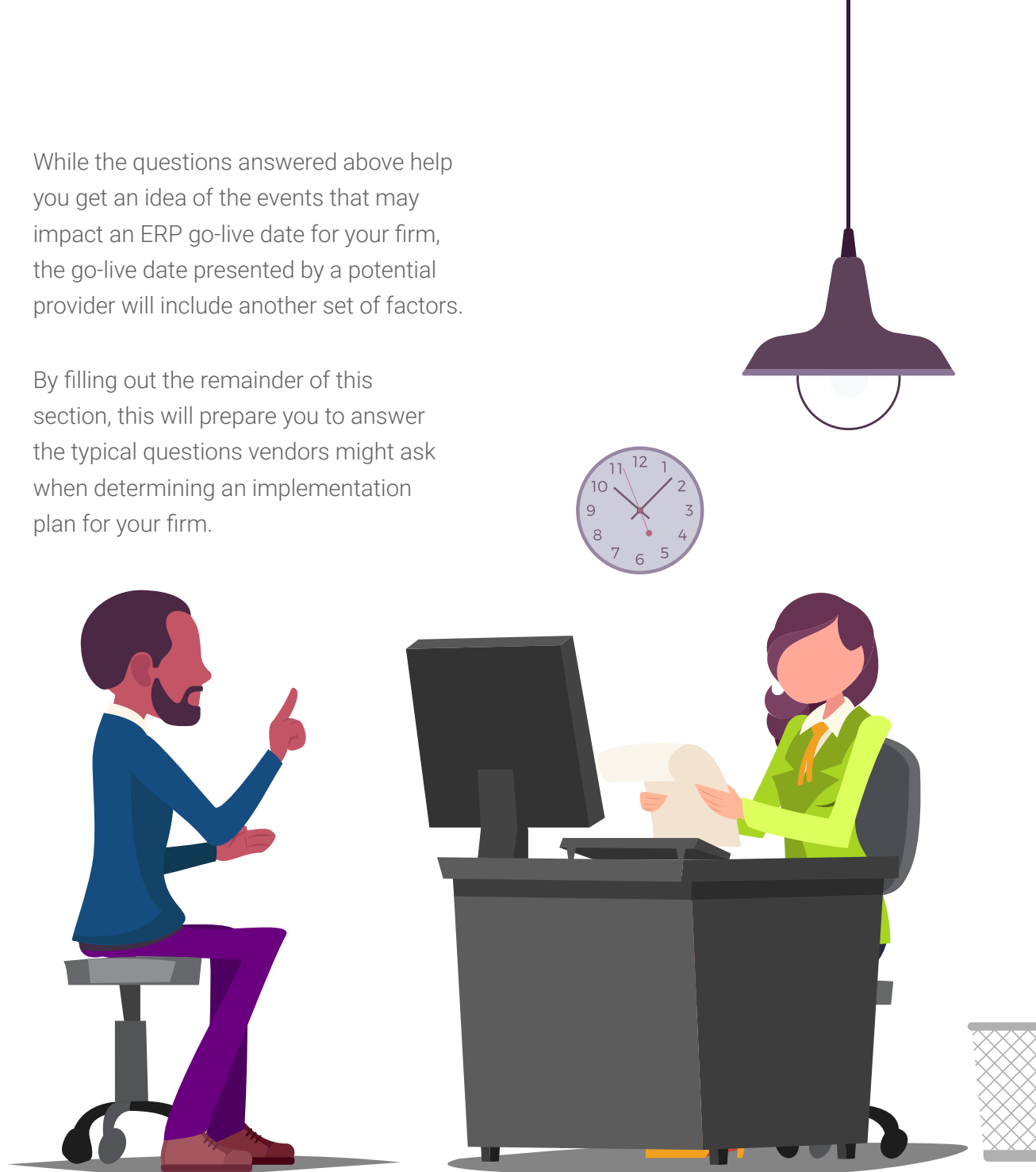
YES	NO
-----	----

If your answer to this question is “Yes,” then you also need to factor in the time necessary to develop, distribute, and evaluate the responses. So, consider not just who's involved or what's happening internally, but the series of internal efforts and external analyses that are all part of the evaluation process as well.

Once you get to the actual ERP software evaluation process, there are also a series of questions vendors will ask you to get an idea of how long implementation will take based on their own criteria.

While the questions answered above help you get an idea of the events that may impact an ERP go-live date for your firm, the go-live date presented by a potential provider will include another set of factors.

By filling out the remainder of this section, this will prepare you to answer the typical questions vendors might ask when determining an implementation plan for your firm.



These factors include, but are not limited to:

1. Size of your organization: _____

2. How many offices your firm has: _____

3. How many different countries your firm is in:

Provinces: _____

Countries/Regions: _____

4. Please note if your firm's processes are centralized or decentralized:

Accounts Receivable: _____

Accounts Payable: _____

Project Initiation: _____

Billing: _____

OTHER PROCESSES	CENTRALIZED OR DECENTRALIZED?

5. Are your firm's processes consistent across all your organizations?

YES

NO

6. Number of legacy systems to be replaced: _____

7. Number of integrations required: _____

8. How receptive or resistant is your firm to change?

_____ Embraces change

_____ Not resistant

_____ A little resistant

_____ Actively resistant

IMPORTANT: If your firm is even remotely resistant to change, you need to establish a change management process as a fundamental part of your implementation strategy.

9. Do you have a change management methodology in place?

YES	NO
-----	----

Now when you start evaluating potential ERP vendors, you'll get through that process a lot quicker by having these questions already answered.

In addition to the competing events you listed earlier in this section, you'll also want to consider a contingency plan. This means coming up with a number of "what if" scenarios with your team. Here are some examples:

- What if our Controller decides to retire? We'll need to go live before he/she retires because he/she was familiar with the old system.
- If our go-live date isn't before MM/DD/YYYY, we'll have to pay another year of maintenance on our old system.
- If we don't go live before tying up our merger and acquisition activities, then our newly acquired firm won't be in the new system.

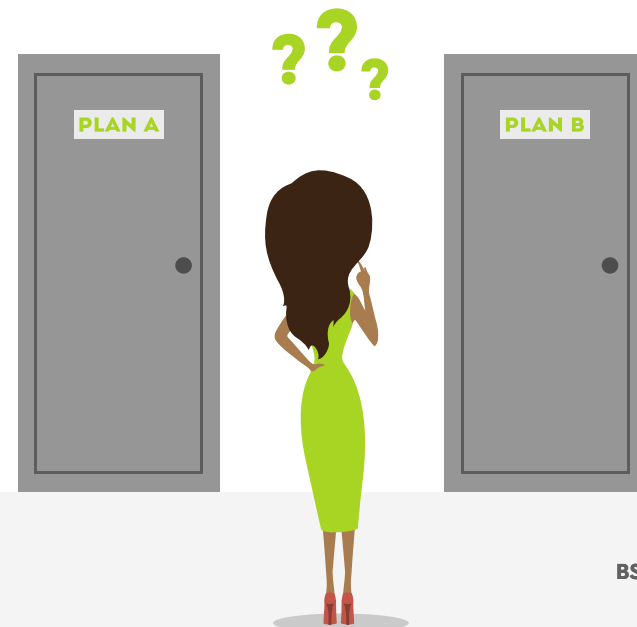
Coming up with these what-if scenarios helps determine if your firm will be ready to go live at the date selected with your vendor. If not, you'll want to go back and revise the original date based on the timing of these scenarios.

That's why this part of your internal analysis is so critical: anticipating any potentially disruptive scenarios helps avoid putting the business at risk.

This helps make for a smoother implementation, and to make what's already a major undertaking of learning a new system and its related processes, an easier transition for your organization.

Add your own "what if" scenarios below:

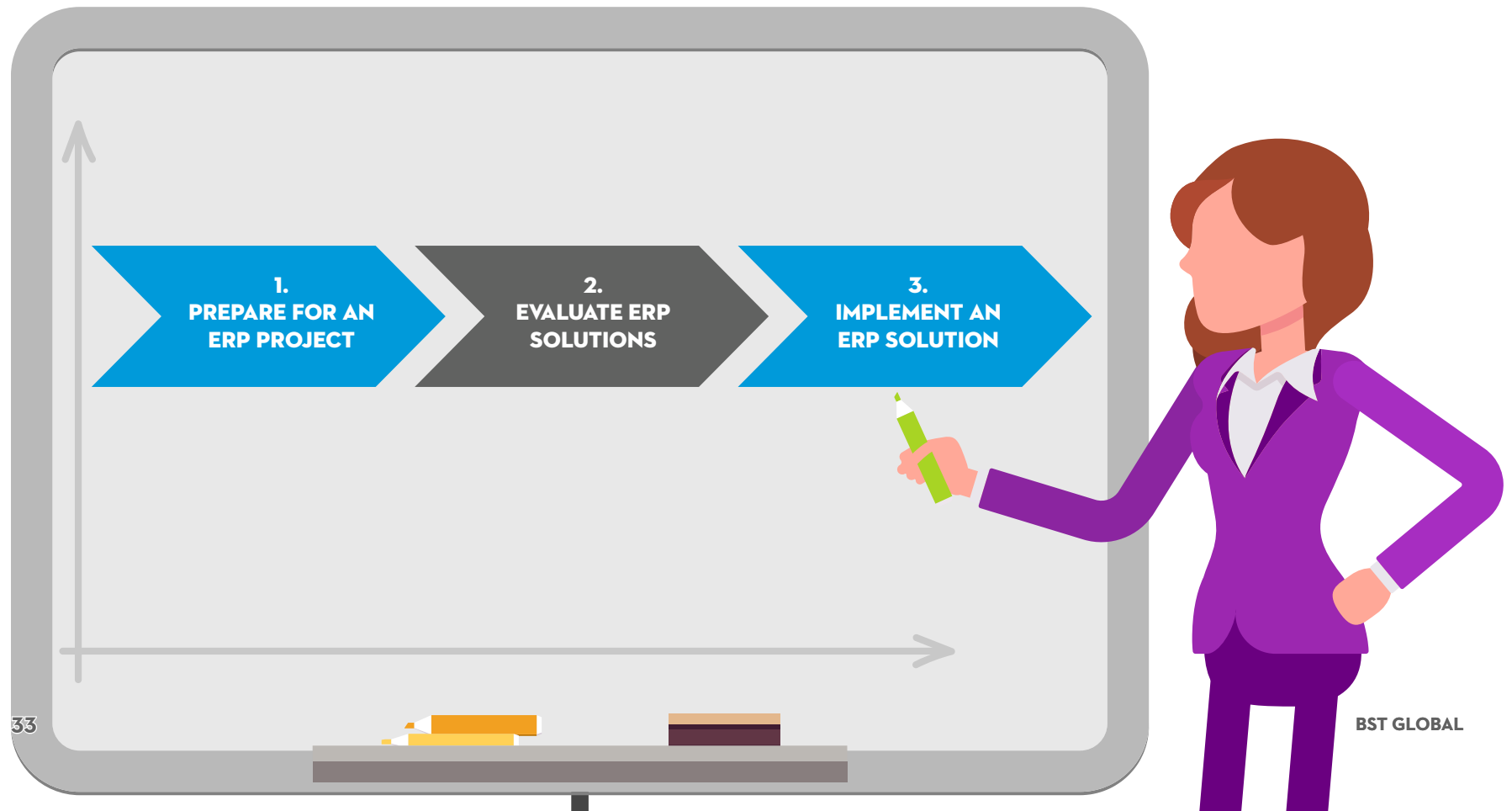
- _____
- _____
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QUESTION 5:

WHERE DO YOU GO NEXT?

Congratulations! You made it! Now that you have the current situation of your AEC firm documented in this worksheet, your team has the tools they need to get Executive Team buy-in, so they can confidently move to the next phase of an ERP project: evaluating ERP software providers.



CONCLUSION

At this point, your team has come a long way. You started with this idea of “We need an ERP solution!”, but that idea wasn’t going anywhere until your team helped you do something about it. Instead of staying in that same ideation phase where many AEC firms get trapped, this worksheet gives your team a tool to start this ERP project and get it moving in the right direction.

But it’s not just about starting the journey, it’s also about starting it with confidence. Making the conscious effort to get these questions answered with your team, puts your AEC firm ahead of the game right from the start.

This may seem like a lot of work to do before you’ve even started looking for a solution – but the time you spend now will save your team from potentially bigger challenges in the future.

That’s the true difference maker – the difference between the AEC firms that skip this step, and the AEC firms that put in the extra effort in the beginning – that have a more successful ERP project in the end.

So, trust us when we say: you’re doing it right.

In covering all your bases by asking Why, What, Who, and When, it will keep your team from entering this project carelessly and will better prepare you to overcome any unplanned mishaps that can surface along the way.

You and your team should be excited! You’ve overcome the stage that stops most AEC firms from taking on an ERP initiative.

And while an ERP project can seem daunting at first, it’s an exciting change. That’s because it’s a change that has the potential to transform your entire business for the long term.

HAVE A QUESTION?

At BST Global, we're here to help. If you have any additional questions about starting an ERP software project for your firm, you can reach out to us at hello@bstglobal.com.

Or, if you're interested in learning about how our robust enterprise resource planning (ERP) solution, BST10, can help your firm overcome its biggest business challenges, visit bstglobal.com for more information.

ABOUT BST GLOBAL

BST Global is the leading provider of enterprise resource planning and work management software solutions for architecture, engineering, and environmental consulting firms globally. Today, over 100,000 end users across six continents and 65 countries rely on BST Global's software solutions to manage their projects, resources, finances, and client relationships. Learn more at bstglobal.com.