The Ultimate Guide to an Easy ERP Deployment: All in 5 Steps

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50% of businesses consider an ERP as an **engine of digital transformation**. It's therefore not surprising that it's the most-searched-for tool by businesses.

ERPs contain all the useful information you need for your business, which can be easily shared across departments. Well implemented, it can save you time and a lot of energy and considerably **increase your overall productivity**.

However, even if most companies use an ERP, it doesn't mean that **implementation** is easy. Each organization is different and has its **own needs**, goals, and processes.

What are the phases of an ERP deployment? What are the major challenges related to its implementation? And what are the most common mistakes to avoid? With Appvizer and **Odoo,** you'll get a step-by-step guide to a masterful deployment.

Summary

The 5 Phases of an ERP Deployment

1 - Do a Preliminary Study

Like for any project, you have to ask yourself why you want to implement an ERP. What problems would implementing an ERP solve?

To define your objectives, you'll want to **analyze each part of your business**:

- Processes
- Information Flows
- Collaboration Between Departments
- Tools Already Used in Your Business, etc.

This auditing phase allows you to **correctly and precisely identify your needs** in the best way possible, meaning what you expect to get out of the ERP implementation.

Furthermore, it **must be tied to your overall company strategy** because it impacts all parts of your business, including technical, financial, and other elements.

👉 An ERP deployment is a **long-term investment** and involves a **considerable budget**. An audit allows you to guarantee that an ERP is useful, and to know how to precisely implement it.

ROI Analysis

Any study before your ERP launch should also include an **ROI analysis**. As an ERP is an investment, it's essential to measure it, ROI will therefore let you estimate its **profitability and efficiency**. It will also allow you to:

➔ Have a precise plan and budget,

➔ Evaluate the Return on Investment (ROI), and its advantages compared to costs

➔ Review specificities according to software,

➔ Alleviate doubts and worries about the project's feasibility.

Risk Management

The other important phase of your "pre-deployment study" is to **anticipate any potential risks**. This will allow you to get ahead of any problem that may arise and negatively impact your ERP project. Identifying potential risks allows you to:

- **Better avoid them** by keeping an eye on different indicators,

- **Better prepare different action plans** for different potential problems that may arise.

👉 For each risk, **come up with a probability of occurrence**, the potential consequences, and fallout for the overall project, an action plan to remedy the situation, and the dedicated person responsible to apply it.

2 - Establish Specificities and Build a Team

Specificities

Technical and functional specifications are made to help define a clear functional scope. You should have a reference document throughout the entire duration of the project. The ERP specifications should be detailed and **as precise as possible.** Instead of needs, specifications cover:

→ All the key information about the business and problems,

→ The analysis was done to show flows, processes, and interactions between existing services and any blockages that may arise,

→ One by one the expected features and benefits they might have.

💡 This kind of document is useful for the service provider you decide to work with. It lays out the kinds of things you expect from them and **significantly improves communication during the implementation phase.**

Building a Team

Once you've decided to implement an ERP, it's time to build a team to study and carry out the project. The main roles in an Odoo ERP deployment are:

→ **Project Manager**: The project manager is the main decision-maker of the project. However, they wear many hats, besides the role of project manager they also have to be a commercial analyst and product expert.

→ **Applications Expert** : More than supporting commercial analysts through complex problems and questions, their main objective is to reduce the volume of personal developments in projects.

→ **Developer**: Not all projects require developers. The majority of small businesses, with 50 or fewer employees, use Odoo which doesn't need any additional personal development.

→ **Single Point of Contact (SPoC)**: For the implementation to be as quick, simple, and manageable as possible, you have to know how to deal with clients' needs. To do this, the Odoo project manager should have similar profiles, with similar needs.

3 - Software Deployment

It's step three where the **ERP installation and deployment** finally come into the picture. This might require an update of your existing infrastructure: **install a dedicated server** to hold all related data, for example, if you choose an open-source ERP.

💡 Opt for a SaaS ERP to make life simpler: all your data is stored on the cloud and you don't have to worry about storing it, the provider takes care of everything.

[Odoo](#) is a completely integrated and customizable **open source ERP**, which also has hundreds of dedicated integrations made by experts. It's an all-in-one solution made to respond to the needs of businesses, no matter their size or budget. With 45 modules divided into 8 main categories, you'll have all your **clients' and teams' needs** taken care of.

👉 The software **takes care of everything**. From strategy to installation, and deployment and follow-up.

Deployment of an Odoo ERP takes into account different elements to ensure an optimal and efficient launch, those include:

Configuring New Settings
The project manager is the one responsible for configuring the software. Once the applications are all set up, they engage the SPoC and key users in a series of training sessions.
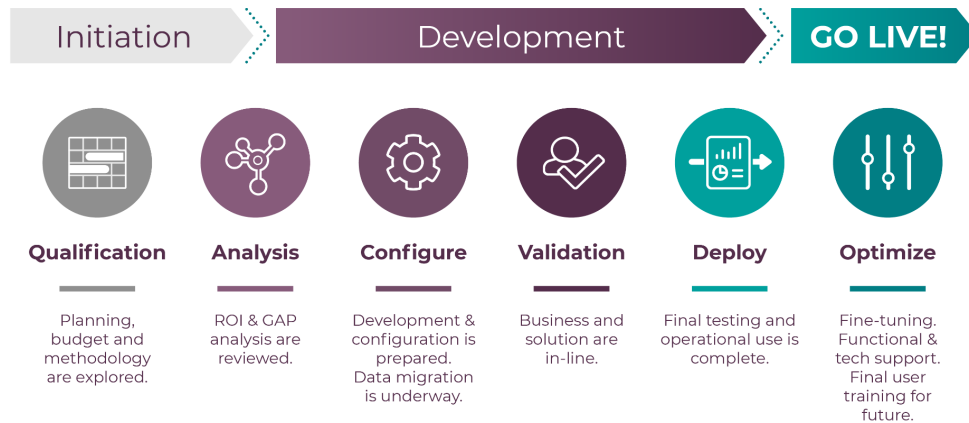
Data Transfer
According to the volume and complexity of the data you have, this is done by either the project manager or a developer. Following the pre-set project instructions, the SPoC and the key users gather data and prepare to import files.

Validation and User Training
Once all the requirements for one phase have been met, the SPoC is responsible for all the final tests and gives the green light for the go-live. As internal Odoo experts, the SPoC and/or the key users organize and train all the final users.

Odoo Implementation

Initiation → **Development** → **GO LIVE!**

Qualification
Planning, budget and methodology are explored.

Analysis
ROI & GAP analysis are reviewed.

Configure
Development & configuration is prepared. Data migration is underway.

Validation
Business and solution are in-line.

Deploy
Final testing and operational use is complete.

Optimize
Fine-tuning. Functional & tech support. Final user training for future.

4 - Second Phase of Deployment and Verification

A month after the initial deployment, the project manager **reviews the list of remaining developments** that weren't launched during the first phase. Means the scheduled developments from a previous phase, you can work without them, but it's not ideal.

With **user feedback**, specific development prioritization will usually change (50% of the development was not needed and new development was requested - Odoo)

5 - Make an Activity Report

1. **Keep it clear and simple**: Three hard-hitting pieces of information are better than ten general ones;
2. It starts from day one: **Keep an eye out for the entire duration of the implementation** and take notes on the potential opportunities for your organization at large;
3. **Be active**: Don't hesitate to organize meetings to learn more about progress
4. **Collaborate with your service provider** and your support teams to compensate for any potential adjustments in the weeks or months following deployment.

4 Major Challenges Associated With ERP Implementation

Technical Problems
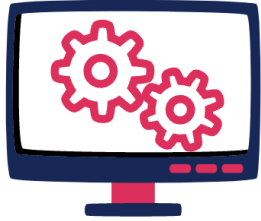
Successfully choosing a software package is important, but it is not the last obstacle: another problem related to implementation is t**he technical aspect of the project**.

If these **needs are underestimated**, they influence the entirety of your deployment results or complicate the first couple of weeks, or months, of use causing a slow-down of your business rhythm.

Fortunately, a large number of **SaaS programs** are available, with:

- a hosted infrastructure,
- data storage,
- software services

👉 This reduces the overall cost and hassle of applications, material, network, and storage problems.

Data Quality Problems

This is particularly problematic for businesses that are **using an ERP for the first time** and who transfer more traditional data to the new system from:

- Excel spreadsheets,
- manual recordings,
- or separate, dedicated applications.

However, this kind of problem can be avoided by using a SaaS ERP: your **data is automatically exported reducing human error**, mistakes, or even bugs due to a large amount of data.

Changes in Company Philosophy

An ERP implementation brings about **big changes** to long-held, daily practices:

- **New approaches** to reporting and data mining and therefore new management principles and practices need to be established;
- **Business models and operational processes** may require massive changes due to new real-time possibilities and data availability.

Adaptation Problems
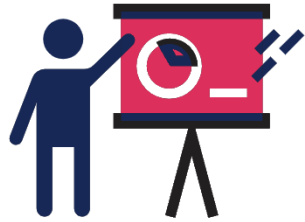
Being open to change is the key to the success of your project ! Consider following these steps to inform and e**ngage employees before, during, and after** your ERP deployment:

➔ Inform all employees about project milestones as they progress;

➔ Establish communication channels reserved only for employee comments;

➔ Encourage employees to come up with new ideas and suggestions;

➔ Organize interesting and promising training sessions;

➔ Highlight the best achievements of users training with the new system;

👉 The employees involved, at all levels, must become **ambassadors for the ERP project team**, for each new implementation. Ignoring the users' experiences and concerns can **put the success of the whole project in danger** and get rid of any existing progress.
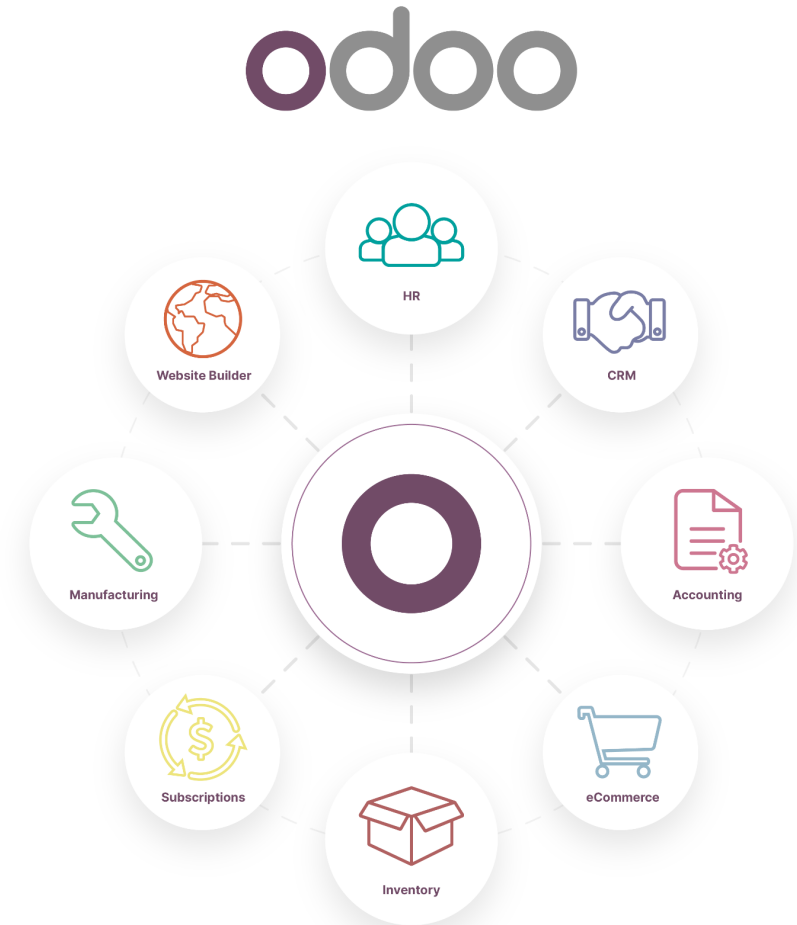
Integrated Business Apps

appvizer

odoo

Appvizer is the first media in Europe dedicated to professional software.

Its mission is to allow professionals to easily find the right software to be more competitive and work more pleasantly on a daily basis.

Odoo is a fully integrated and customizable open source software, containing hundreds of commercial applications designed by experts.

It is an all-in-one software solution designed to meet the needs of businesses, regardless of size (or budget).