

# Fast Track System Implementation

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# Background

- ◆ Fast Track Systems Implementation - provides an initial starting point for a company upgrading or replacing the software package for a functional area or countrywide, when there is substantial pressure to complete this benchmark in an extremely short time frame. My clients use this strategy to save time and as a framework to manage outside software vendors and implementation firms.

# Overview

- ◆ A lot of these handouts and what I say will sound basic. Therefore you will ignore it and increase time and costs to execute your system implementation.
- ◆ My time pressures were so short that I had to install a barebones system and then add fuller functionality later.

# Systems I Have “Experienced”

- ◆ PC based systems
  - Installed - Timberline, Platinum, Macola
  - Used - DacEasy, Peachtree, SBT
- ◆ Mid range systems
  - Installed - J D Edwards
  - Used - MAPICS
- ◆ As regional or national beta - Macola NT, J D Edwards, Configurator
- ◆ Selected Fourth Shift and Great Plains for someone else to install

# How Critical Is Time On Your Needs Analysis?

- ◆ Needs Analysis -2 page version can produce "Deal Killer" top 10 needs
  - This approach can also be the basis to summarize a 30 page RFP
  - I used the 2 page handout as the basis of a 90 day Phase 1 installation
- ◆ RFP can be a 30 page product for more complex needs

# Investment Price Ranges

- ◆ Chevy - under 50k
- ◆ Buick - 50 to 125k
- ◆ Cadillac - 125 to 250
- ◆ "Tier 1" pricetags

# Inexpensive Sources of Information to Start Your Process

- ◆ Your audit or tax management provider
- ◆ CFO Magazine annual survey
- ◆ State government organizations
- ◆ Industry oriented exhibitions - ex telco, manufacturing, and distribution
- ◆ Organization presentations like this
- ◆ Goal of this session is a FEI Internet chat topic to help our members

# Pitfalls I Have Learned From

- ◆ Project Manager Ownership is vital!!
- ◆ Give staff ownership
- ◆ Run the conversion like you were selling something to an external customer
- ◆ Keep other top management informed and 'buying in"
- ◆ Test, test, test on real data
- ◆ Phase the installation
- ◆ Accomplish some monetary or major improvement in the early stages.



# How We Used the 2 Page Selection Criteria

- ◆ How we developed the list - 3 wishes
- ◆ Selecting a short list of 3 vendors
- ◆ Vendor presentations
- ◆ Selection
- ◆ Negotiation
- ◆ Team buy in
- ◆ Implementation
- ◆ Add ons

# Key Constraints In the 2 Page Selection Criteria Provided

- ◆ Will existing hardware and/or operating system be a limiting factor?
- ◆ What are future expansion constraints on growth, products, money and time?
- ◆ Does your present or future product lines require any level of manufacturing?
- ◆ Plan for user 'Scope Creep'.
- ◆ How sophisticated are management and staff users?

# My Next List Will Consider

- ◆ Internet features - existing and future
- ◆ Level of ERP integration
- ◆ Ability to move to a "Tier 1" system
- ◆ Access to local or national training
- ◆ Annual user conventions