

# 10 Expert Tips for international ERP Roll-Out Success

For practical insight and real-life guidance  
to inform your project planning

If you are involved in implementing Microsoft Dynamics AX, now or in the future, this useful guide compiled by AXpact Director Keith Dunkinson, author of "Implementing Microsoft Dynamics AX2012 with Sure Step 2012", outlines clear, practical advice in 10 key areas and offers an invaluable source of insightful tips for your successful international ERP implementation.



## 1 Global/Local Deployment

Obviously an international project requires co-ordination of resources in multiple countries. The internal and external project team and stakeholders need to be identified for both the global build and the local deployments.

It is nearly impossible to create an inclusive environment where all stakeholders from remote locations in multiple time zones can be present – even using video conference as mentioned later. It is therefore critical to establish how and when the various stakeholders will be represented and to set-up routine communications to establish this. The Communication Plan on international projects is much more important than on smaller, less formal projects. It isn't possible to recommend a one size fits all approach as projects may vary by:

- Size
- Complexity
- Value
- Number of deployments
- Number of external parties and systems engaged
- Tiers of stakeholders (local, regional, global, group, etc.)

Engaging a Project Director and suppliers who have experience in similar types of project should be very helpful – even if just in shaping the Project Initiation.



## 2 Wave Planning

Global projects tend to be larger than average, sometimes by orders of magnitude. The build phase is usually somewhat longer, but managing the multiple deployments can add years to the project. A recent project we worked on had sequential deployment into thirty countries and projects like this are not uncommon in AX. Project Managers have generally realised that creating a detailed project plan for the whole duration is a pointless exercise as it will change many times over the duration of the project and create an unmanageable project administration burden. AXpact suggest creating a high level plan covering multiple phases or waves of the project delivery and agreeing how far in advance it is sensible to plan in detail.



### 3 Budget Management

Budget Management might at first seem like a simple and even boring subject, however it ought to be one of the first disciplines to be put in place. On global projects, costs will be collected and shared into multiple legal entities in multiple currencies. The impact economic fluctuations (such as the UKs recent BREXIT referendum) can cause currency valuations to alter and this can affect a project. The cost collection and apportionment between internal legal entities adds considerable complexity to accounting and the fact that global projects run into millions or even tens of millions of dollars' dictates that adequate project accounting rules and probably a project accounting tool will be required. It is vital to put this in place before the project starts; if proper disciplines are not outlined and followed from the start it may create impossible reconciliations later on. It is also valuable to have Change Request mechanisms agreed early on that can maintain appropriate stakeholder involvement but also enable fast decision making as Change Requests are sometimes critical to project progress.

It is also worth mentioning that if a Cost Benefit was properly developed for a project then a Benefits Evaluation mechanism should be included in the project disciplines so the intended Benefits can be evaluated throughout the project and efforts tailored to meeting these outcomes.



### 4 Facilities

As larger projects are engaged, the facilities required to run the project should be considered as a pre-requisite. For a period of several years, consultants and the internal project team will need offices and several meeting rooms will be in virtually permanently use. This can put a significant load on an organisation's facilities. It is worth considering room booking protocols, dedicating areas for the project (meetings, work areas, training and testing environment, etc.). For the larger meetings there may be upwards of thirty people and local external facilities may need considering.

Further, the consultants and remote attendees from the global offices need accommodation. It is often possible to save tens of thousands of dollars by considering:

- Buy or lease vs. renting cars
- Carpooling between the project team (ten people at one hotel doesn't need 10 cars)
- Renting long term accommodation or agreeing very special hotel rates
- Agreeing a specific expense policy

For the consultants and project team, it is important to have a pleasant and efficient working environment; without this a project can get off to a poor start.



### 5 Task Management

Project Plans are great for showing activity at a level no more granular than one day. Projects require thousands of tasks to be managed and these need to be allocated, agreed, chased and tracked. It is still quite common to use spreadsheets for this; however, they are quite ineffective as a multi user tool. There are plenty of much better and quite inexpensive task management tools to consider such as Jira, Teamwork, Wunderlist etc. Their implementation for the project requires a little training, guidelines and discipline to make them effective as too much communication tends to get ignored and too little tends to lead to confusion. Tuning this can be the key to the effectiveness of internal and external project teams on larger and remote projects.



## 6 The Lure of Azure

The rapid evolution of Cloud based environments has addressed an age old problem in ERP projects. The needs of the infrastructure for different phases of the project can be quite different and it is desirable to defer large capital expenditure. With cloud based solutions, the infrastructure can be scaled up and down quickly and easily for a simple change in the monthly fee. This saves making capital investments in environments pre-go live and allows a scaled down system for development and save the expenditure for when it really needs scaling – Production.

The cloud based systems also mean a full scale Disaster Recovery site can be maintained for a fraction of the charges this would normally incur as you only really pay for the system when it is being used.

Finally, on Azure Microsoft have integrated some great support tools through their Lifecycle Services offering. These include being able to size and scale the environment appropriately and being able to snapshot systems for support purposes.



## 7 Meeting Management

The reduction in price and maturity of meeting tools such as Go to Meeting, Microsoft Lync or Polycom Video Conference equipment has made for much easier management of meetings with remote attendees. In the past these tools have been frustrating, but nowadays they are invaluable. On a larger project it is worth introducing these tools and their use at the start of the project and agreeing protocols for managing them. Some training and the provision of simple audio equipment including: good headsets for remote attendees, local low cost or free dial in numbers, and meeting room conference phones will make a substantial difference. It is also worth considering the costs of international telephony; it is now easy to avoid large roaming charges – and if you don't consider these options you could easily see some crazy cell phone bills!



## 8 Project Representation

On a large project it is essential to have an internal Core Team who are dedicated to the project. Without doing this, project progress is likely to be negatively influenced by business workload and people's availability. The full time members of the Core Team need to be able to represent the major Process Areas to be impacted and should ideally previously been senior users in the business. As soon as they become Core Team members they are no longer doing the day job full time and need to maintain close communications with the Vice Presidents or Directors who are the Process Owners, as well as the Key Users within the business. These Core Team members will probably need their previous roles to be backfilled. In global projects each of the global Core Team members will have a local counterpart in each location who will normally assume a part time responsibility, possibly escalating to full time during their local deployment phase. It is also important to consider at what points in the project the local team should be engaged. It is almost always desirable to include them in requirements and design but not always time or cost effective.



## 9 Languages

Although all projects vary, we have found that most global projects benefit from a common global project language (usually, but not always, English) and local language support for the delivery team. Even where a deployment is to be in English language with English language screens, using local linguistic and cultural support is often beneficial. For example, an American company deploying their system to a subsidiary in Indonesia. The Indonesian End Users have a good chance of interacting well with the English Language screens although there is choice about which language to use. Let's say the American project team visit Indonesia to deliver the training they might:

- Train in English with the help of a local translator
- Train a local trainer who trains in English
- Train a local trainer who trains in local language

These are all valid options with different pros and cons. It is important to consider the right approach for each territory, which will depend on a variety of factors including language, legal and fiscal differences between the local office and the head office and others.



## 10 Begin with the end in mind

It is surprisingly common for companies to assume that the local offices work the same way as the central office, or to adopt an approach of "if they don't work our way now, they will by the end of the project". Almost inevitably this is found to be a poor assumption leading to some late disruption to the project rollouts. Engaging the deployment countries in the requirements and design is usually very beneficial, as it allows all members to feel engaged with and positive about the direction and purpose of the implementation.

## About AXpact

AXpact has assisted international companies to implement and manage their Microsoft Dynamics AX projects since 2004. Our team have been involved with over 1500 AX projects and over that time we've learnt a thing or two about how to implement AX within realistic time frame and budget.

We asked AXpact Director Keith Dunkinson to put together a summary of his top tips for success when planning an international AX project. Keith has been involved in numerous international AX projects both large and small. He is also the author of "Implementing Microsoft Dynamics AX2012 with Sure Step 2012", which has helped many project team's members, both partner and client side.

## Can AXpact Help?

If you are considering or even currently involved with an international Microsoft Dynamics AX Project and want to discuss or expand upon any of the above points, then we would be happy to assist. Our initial advice is without obligation or charge.

## Buy the book

If you would like to find out more, then purchase Keith's book, **Implementing Microsoft Dynamics with Sure Step 2012.**

