



Ready, Set, Migrate –Preparation for Migration From or To MANMAN

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- The content of the presentation will be tailored to the desires of the audience.



Overview

- What is the dilemma?
 - Even if you are staying, you need to have an estimate of effort to leave when the time comes
 - Does **Infor's** direction meet your corporate needs?
 - Can you really staff and support yourself even with outside help – is this the right thing for your organization?
- What are the issues?
- How can you prepare for a migration?
- Q&A



Remain, Replace or Rehost

- Evaluate where you are
- You must know the requirements before you can make any decision to stay or go
- Know where you are going ~ 3-5 year window
 - Business requirement will drive the process
- Each path requires an assessment
- Each department must have input & contribute



Migration Preparation

- Expected Migration Paths
- What do you do now?
- Why Surround Code is important
- Preparing Your Team
- Governance is EVERYTHING!
- Document the Business Processes
- Decision Time!

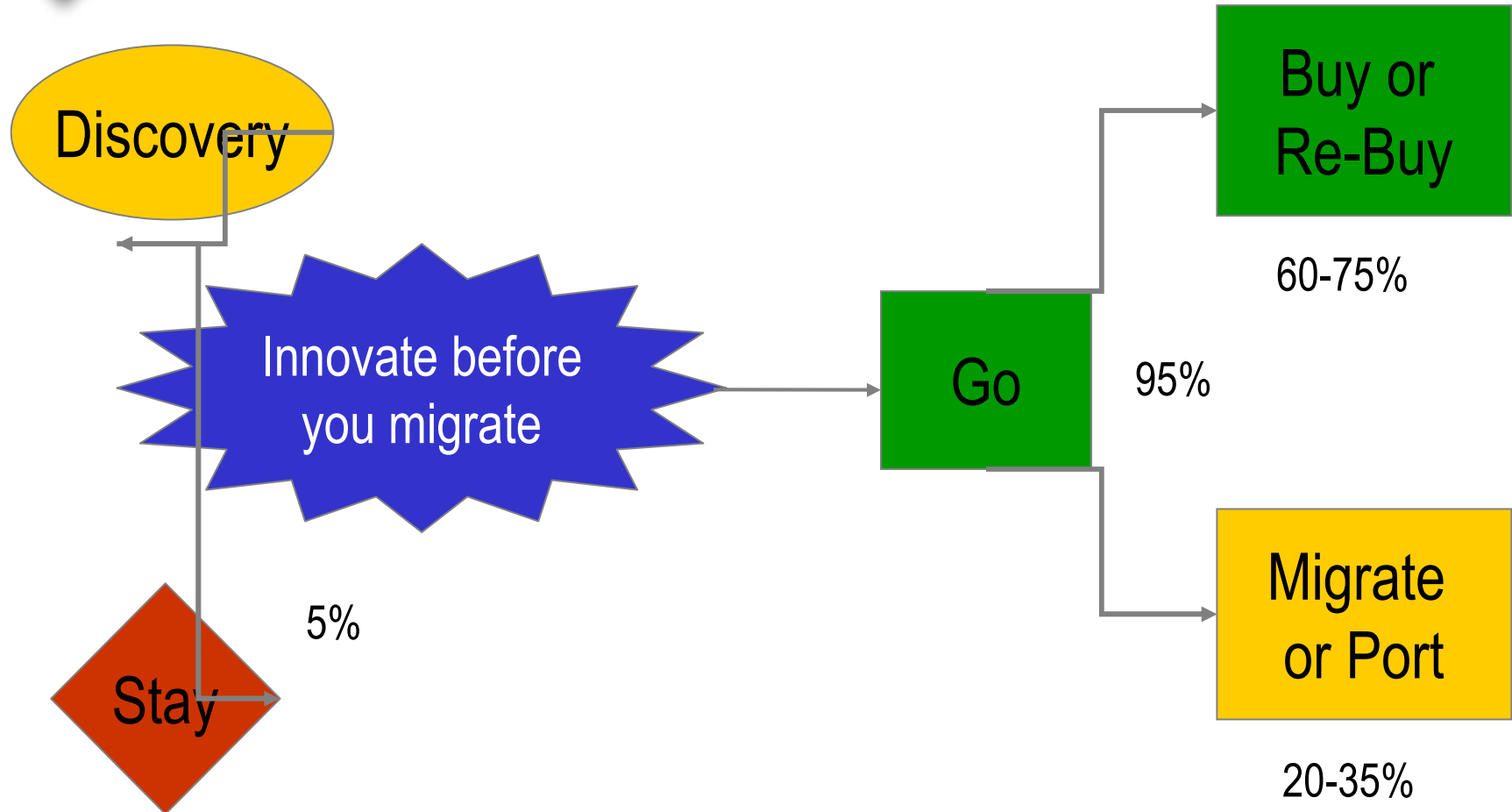


Expected Migration Paths

- Estimated 60-75% will go through application selection
- Estimated 20-35% will migrate current application or surround code
- Estimated 5% will stay



Migration Assessment Process





Innovation

**Innovate
before
you migrate**

Projects that effect
operational efficiency
and ROI

Projects that build
skills and experience

Projects that will help
with year over year
comparisons in future



Customer's Choices?

- Depends on Business needs
- Depends on Application Support
- Depends on Hardware, Software Environment
- Staffing
- Legal/Compliance



What Do You Do Now?

- What parts of MANMAN do you use now?
- What work flow / interfaces have you added?
- What are you doing for Shipping and Receiving?
- Do you have an accounting interface?
- Do you have any surround code to replace?



Why is Surround Code Important?

- Surround Code completes your application
- When you replace the main application
 - You still need to ship
 - You still need to receive
 - Your finance department still expects the extracts
- Reports need equivalent replacements
- Quiz, UDMS, Suprtool, and other tools



Preparing Your Team

- You need involvement from all levels
- DO NOT start this process if there is no upper management involvement
- You require representation from each department
- You need to understand the current & future requirements
- You need common goals/commitment



Why Governance is **EVERYTHING!**

- Proper governance is required to manage the scope of the project
- When the schedule is set, the resources must be committed for the times they are required
- Any change request must go through the project taskforce
- Impact on schedule must be approved prior to rescheduling



Document the Processes

- Document Every Process
 - What it is
 - Who it affects
 - Inputs, process, and outputs
 - How important to the business
 - What platform and language
 - Who maintains it



Decision Time!

- For Each of Remain, Replace, or Re-Host:
 - Cost
 - Timeframe
 - Viability
 - Your Team & Skills
 - Your Needs
 - The Risk
- Pick One (you may have to pick 2 if you have surround code)



Migration Overview

- Software Selection
- The Vendor Demo
- The Scorecard
- Timing is everything
- Working with the Implementer



Migration Overview

- Keeping on schedule
- Training
- The cutover
- Going Live
- Post Implementation Review
- Scheduling the 'Parking Lot' items
- Decommissioning the old system
- Conclusion/Summary
- Q&A



Software Selection

- Need to look at a group of vendors
- Will you want just one integrated suite?
- Does the suite replace the surround code?
- Must look at sweet spot for vendor, cultural fit for your organization
- You will need to come up to speed on the latest xTLA's; like SCM, SOA, SaaS, etc.



The Vendor Demo

- Eventually you need to decide the key workflow
 - Order to cash
 - Forecast to cash
- You want each vendor to demo their workflow for this scenario
- You will be having the different departments score their section of the workflow



The Score Card

- What are the most important parts of the workflow?
 - Required = 10
 - Nice to have = 5
 - Not wanted = -3
- Consistent scoring but departmental team is important
- May take more than one pass



Timing is Everything

- When will you close the deal?
 - End of quarter/calendar year?
- What do you want in the deal?
 - Who is on the implementer's team?
 - What about training?
 - Who cleans the data – what tools (start early)
 - Fixed 5 year cost of ownership
- Get the concessions you want in writing and include in contract
- Let ERP provider know you will be doing this early so someone who can say “Yes” is involved early
- When can their team start – phased approach?



Working with the Implementer

- You need to become a team with a common set of goals and time-lines
- Different phases, different people
- Who will keep the implementer on track
 - Separate from Implementer's Project Manager
 - Must be able to push both implementer and organization team
 - Needs to be relentless



Keeping on Schedule

- It will be tough!
- You must allow some slack for:
 - Vacations
 - Personal time
 - Sickness
- Each Department has at least 2 members on the taskforce for a reason



Training

- Training is part of the schedule
 - Delivery methods
 - Train the trainer
 - Video
 - Instructor lead
 - CBT (Computer or Web based training)
 - Not too early
 - IT has to get trained to bring up test dev box
 - Need clean representative data to start training



The Cutover

- History gets moved early
 - Narrows the cut-over window
- Decide on last transactions to go into old system
- Have you tested everything?
- What about surround code cut-overs?
- How is the auditor certifying the process?



Going Live

- Where is the help desk?
- Can we get implementer to have extra staff present?
- Availability for priority support for 6 weeks
- Internal triage - Is it a problem or a PBKAC?
- What are the back out points (go/no go) ?



Post Implementation Review

- Celebrate – you are almost finished
- What are the parking lot items?
 - Prioritize along with the go-live issues
 - Plan the work
 - Work the plan
- What went right – what did we learn?
- Any functionality missing?



Scheduling Parking Lot Items

- Requires resources
- You promised – better have these as SOW's



Decommissioning Old System

- Accounting retirement
- Legal
- What about future audits?



Summary/ Conclusion

- There are many pieces required to get the MANMAN replacement process completed
 - Understanding where you are coming from
 - Understanding business requirements
 - 3-5 year plan
 - 3-5 year cost
 - Selecting the new package
 - Configuring the new package
- Be kind to the vendors they invest too!



Decision Framework

- Who is your trusted advisor?
- What are the business needs and plans?
 - What is the business & technology baseline
 - What are the business & technology targets
- Application
 - What is used now?
 - What mods & APIs?
 - What are the alternatives?



Next Steps

- Executive Seminar – SMT & IT
 - Discovery of what is impacted by HP's decision
 - A look at current alignment of business/ IT
- Detailed Assessment
 - Build the plan for each application
 - Assign Resources and time-frames
 - Get the budget in place

