BatchMaster Delivers on Promise of Quick Logical Implementation Methodology

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Bill Paschka Director of Operations, House-Autry Mills

House-Autry Mills, (Newton, NC) is a leading supplier of dry-mix good in the food manufacturing industry. Their Director of Operations, Bill Paschka is a veteran of both the food manufacturing industry and of Enterprise Resource Planning (ERP) implementations.

In the ERP Marketplace, the promise of speedy implementations has often fallen short of expectations. Companies who choose short-cuts and in-sourcing of implementation services can easily implement a solution that does not meet the original goals of ERP acquisition. On the other hand, companies that choose the wrong solution for their marketplace can suffer prolonged implementations from vendors armed only with the question of "How would you like it to work."
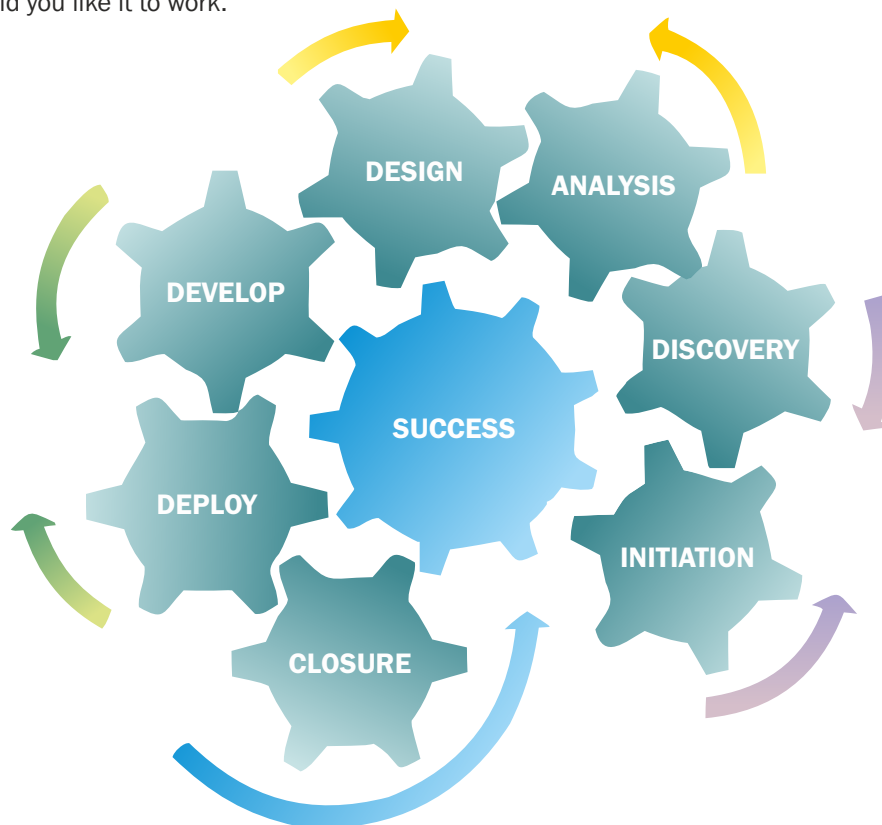
BatchMaster ERP, the proven solution for process manufacturing, offers its market the best of both worlds. Because of their depth of resources, years of industry service and proven implementation methodology, BatchMaster offers implementations that achieve their goals in months, not years. "We were able to implement and go live in about four months," notes Paschka. "I've seen a number of these types of implementation drag out with far less impressive results. When all was said and done, BatchMaster deployed a system that made company data more accessible and easier to use. BatchMaster has increased productivity, and reduced manual processes. The state of our company today is that our system and processes are a lot better and a lot faster."

BatchMaster delivers on their promise by offering their customers a solution-set that tracks directly to the functionality needed for their vertical and sub-vertical market customers. BatchMaster ERP belongs to a small class of ERP vendors that offer out-of-the-box implementations to many of their customers, limiting the need for customizations to new systems.

INITIATION

The Initiation stage represents the official start of the implementation. This is the stage where the implementation team makes sure that they know everything promised to the customer by the sales team!
It sets out to answer the questions: "Why did the customer decide to implement a new ERP system?" and "What is the customer expecting of their new BatchMaster ERP implementation?"

This stage includes understanding the Customer's high level expectations, business environment and what the main areas of improvement are. It also documents everything that has been discussed in the Sales process (including all functional configurations and report customizations shown/discussed during the sales demonstrations).

DISCOVERY

BatchMaster ERP is designed to work the way the user does. BatchMaster consultants configure BatchMaster ERP to match, as much as possible, the way our customers operate now and in many cases, <u>need</u> to operate to meet their own and their customers service level requirements. Of course, the implementation of an ERP system frequently gives an opportunity to work more efficiently, and to do away with tasks and processes that exist only because there wasn't an integrated ERP solution to handle those tasks.

The Discovery stage, then, is where the customer's existing business processes are documented and any opportunities for process improvement are identified, discussed, and documented.

To help with this process, the implementation team installs the software first. The customer is given an overview of the Master Data system requirements which forms the base for all future data setup in the system. Discussions on improvements to processes and procedures can then be visually related to the reality of an integrated ERP system, during business process workshops where the consultants and the customer document and model the future state of those improved business processes.

The documentation of the customer's requirements, and the outline of how they will be met, becomes the Business Requirements Document (BRD) which is an input to the Detailed Analysis Workshop in the Design stage. These are analyzed and reviewed with the customer to obtain final approval, and the document forms the basis of a detailed scope for the implementation. A gate review is conducted at the end of the stage to ensure that documentation meets BatchMaster's quality standards, and that any risks and issues are proactively addressed going into the next stage.

DESIGN

The goal of the Design stage is to define how the customer's requirements and process improvements identified in the Discovery stage will be implemented into the BatchMaster ERP solution. The stage includes a "Detailed Analysis" Workshop to determine the requirements that are a "Fit" for the BatchMaster Solution, and where there are "Gaps' that may need some form of customization. The customizations can range from simple user interface or report modifications to complex functionality additions or modifications, and may also include the integrations and interfaces and data migration elements needed to support the requirements.

The Design phase culminates with the completion of the Solution Blueprint Document. The project scope is revisited, with all requirements considered within the scope of the project cross-referenced to one of these documents. Customer approval is obtained on all the design elements and the final customization effort estimates (if any, as necessary), and the team is readied for the execution effort in the Development stage. Again, the deliverables are quality-checked.

DEVELOPMENT

The goal of the Development stage is to build a Pilot configuration (based on the customer processes and requirements) and test the system components defined and approved in the Solutions Blueprint. This is achieved by populating the system with the customer's Master Data, supplied by the Customer to the BatchMaster team via a Master Data Template spreadsheet which is then input into the system by the BatchMaster team. The system is completely configured, and trial transactions are entered and evaluated. This pilot includes the development, implementation and testing of any customizations, integrations and interfaces identified as necessary.

Testing completed in this phase includes process and data (system) acceptance, and end-to-end testing to ensure that all components of the solution are working together per customer specifications. Iterative User Pilots (0, 1, 2...) are conducted with the end users to ensure all system requirements are addressed.

A full review and final approval of the success of the Pilot Configuration is carried out by the Customer stakeholders and power users. The customer's final system acceptance resulting from a Conference Room Pilot leads to freezing the system configuration for Training and Go-Live activities in the Deployment phase.

The Development stage involves ongoing project management activities to manage risks and issues, communications, change requests and project plan updates. Upon completion of all testing and re-configuration as necessary, the solution blueprint document is updated to reflect the final design (if required).

The customer infrastructure team completes and provides the project team with the Production environment specifications so that the BatchMaster project team can start planning the pre go live activity. Finally, all deliverables produced in this stage are checked for quality and the stage gate review is conducted to ensure that the stage is completed per the quality requirements of the customer.

DEPLOYMENT

The Deployment stage is where all the efforts of the project team come together for a successful transition to the new BatchMaster ERP solution. Key activities in this stage include End User Training, User Acceptance Tests (UAT) and the actual cut-over to the new production environment and Post Go-Live Support. BatchMaster consultants train the users in all the tasks relevant to their roles in the customer's organization. The customer determines which users will have access to each "module" in the system (i.e. Lab, Production, Sales, Purchasing, etc.) and their access is configured to the permissions (read, write, delete) of each screen. Password protection of critical access points in the system are also established to secure that information which is protected most closely.

Upon successful completion of the User Acceptance Testing (UAT) and the training of Key Users, a business go/no-go decision is made on whether to proceed with the go-live or to defer until any critical issues are resolved. The customer infrastructure team and BatchMaster project teams prepare the production environment for the cutover tasks that lead to the go-live milestone. Cut-Over tasks involve bringing in Opening Balances and maintaining open PO, SO and Batches. Required configurations and tweaks may be made, and performance tuning maybe performed if necessary. All Data Migration tasks are executed in the production (live) database. The customer performs a Physical Count and BatchMaster Implementation Services Consultants compare the BatchMaster Inventory Valuation report with the Customer's legacy Inventory Valuation reports and get the customer's approval before moving ahead.

The system is now ready for go-live and any subsequent environment changes are placed under the change control process. An Implementation Closure Issue List is prepared to maintain continuity of the outstanding implementation issues. Another key activity in this stage is the knowledge transfer of the system backup procedures by the consulting team to the customer.

The customer receives post go-live assistance from the BatchMaster consulting team, who will "hold their hand" until the users are comfortable with the new system.

CLOSURE

The Project Closure stage defines the activities required to close the project and transition knowledge to the customer.

This stage involves a meeting (with the Customer, BatchMaster Project Manager, Customer Support Manager, Account Manager and the project team) to discuss the Issue List and outstanding issues. The Project team prepares the final invoices, lessons learned, and the project closure report. The team also prepares a folder with all the project deliverable documents with their approvals. These documents are reviewed with the customer to obtain final signoff and acceptance.

At this point, the Implementation Team hands over to the BatchMaster Support Team, who will provide on-going support and upgrades per the customer's chosen support plan.

BatchMaster has achieved excellence across process manufacturing fields like food, cosmetic, chemical, coatings, biotech and other manufacturers. These same consultants leverage BatchMaster's proven implementation methodology to secure quick and accurate implementations like House-Autry's. According to Bill Paschka, "BatchMaster's consultants did an excellent job of listening to our requirements and configuring the system to do exactly what we wanted... We were able to go-live with BatchMaster in about four months."

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