



Title	Implementing an ERP & Process Re-engineering Project Team Readiness Workshop
Purpose	To provide the client’s project team with a good understanding of the methodology that is typically followed as part of implementing an ERP, what to expect at each stage of the project, and educate the project team in how to use a range of tools/templates & techniques that will enable them to complete the project successfully.
Prerequisites	None
Duration	4 x 5 hours (4 days)
Learning Outcomes	Participants will be able to: <ul style="list-style-type: none">• Understand the project delivery lifecycle and key phases/tasks that are executed when implementing an ERP.• Appreciate the range of terminology that software vendors use within their methodology.• Develop an awareness of project management tools & techniques and practice these in the workshop within the context of the client’s project.• Understand some of the lessons learnt from previous ERP implementations & discuss how the client can plan to avoid the pitfalls.• Understand the change management framework that is critical to successfully implementing an ERP.• Develop an awareness of change management tools & techniques and practice these in the workshop within the context of the client’s project.• Understand the role that business process re-engineering plays when implementing an ERP.• Develop an awareness of business process re-engineering tools & techniques and practice these in the workshop within the context of the client’s project.• Develop problem solving skills and a strong team dynamic amongst the project team members, through the use of a number of group activities.• Establish an elevated level of competence and confidence within the client’s project team, in readiness for kicking off the ERP implementation.
Contents Overview	Session 1: Project Delivery Lifecycle (est dur – 5 hrs) <ul style="list-style-type: none">• Review of the key phases/tasks/deliverables of an ERP Implementation:<ul style="list-style-type: none">• Project Initiation & Planning• Solution Design & Development• Delivery & Implementation• Support, Handover & Project Closure (PIR)• How to structure a project team & key streams of work.• The role of the Steering Committee & Project Sponsor.• The role of the Project Manager (responsible for managing Tasks, Deliverables, Scope, Resources, Timeline, Budget,



Risks/Issues, Interdependencies, Critical Path).

- The role of Subject Matter Experts.
- The role of the Software Vendor & their contract.
- Establishing a Project Charter for the project
- Scope & Objectives/Benefits for the project (group exercise).
- Risks & Issues Register for the project (group exercise).
- Critical Success Factors for the project (group exercise).
- The Project Plan & Resource Plan – what it needs to cover.
- How to ensure Quality Assurance during each phase of the project. Checklists that can help ensure the success of the project.
- Key terminology to be aware of (Glossary of Terms).
- Lessons learnt from previous implementations:
 - Case studies from Oracle & SAP on previous implementations.
 - How the client can avoid the pitfalls (group exercise).
- Free Topic Forum No. 1 (areas of specific interest listed by the group for further discussion, question & answer session, etc) – “Everything You Wanted To Know, But Were Afraid To Ask”.
- End of Day Quiz/Crossword Activity.

Session 2: Managing Change on an ERP Implementation Project
(est dur – 5 hrs)

- Review of the Change Management Framework:
 - Stakeholder Management & Communications.
 - Training.
 - Process/Procedure Documentation.
 - Human Resource & Organisation.
- Stakeholder Impact Assessment (group exercise) – BTOPP Model.
- Training Needs Analysis (group exercise)
- Communication Plan (group exercise)
- Developing & delivering end-user training materials (blending vendor, cultural & organisational influences).
- Free Topic Forum No. 2 (areas of specific interest listed by the group for further discussion, question & answer session, etc) – “Everything You Wanted To Know, But Were Afraid To Ask”.
- End of Day Quiz/Crossword Activity.

Session 3: Business Process Re-engineering Tools & Techniques
(est dur – 5 hrs)

- Problem solving/team building group exercise.
- Tools & techniques used in Business Process Re-engineering (BPR) work.
- Group exercise on process mapping – key client process areas.
- Linking process maps to system functional requirements.
- Linking process maps to system testing scripts.
- The importance of version & document control.
- Free Topic Forum No. 3 (areas of specific interest listed by the group for further discussion, question & answer session, etc) – “Everything You Wanted To Know, But Were Afraid To Ask”.
- End of Day Quiz/Crossword Activity.



Session 4: Ensuring a Successful ERP Implementation
(est dur – 5 hrs)

- Monitoring interdependent projects (group exercise).
- Data cleansing & conversion (group exercise).
- Planning a pilot conduct.
- Project governance reporting & project meetings (group exercise).
- The role of a Project Office/Project Admin.
- Preparing the handover to normal operations (business as usual resources).
- Free Topic Forum No. 4 (areas of specific interest listed by the group for further discussion, question & answer session, etc) – “Everything You Wanted To Know, But Were Afraid To Ask”.
- Presentation from Project Sponsor (CSF & Role of Project Sponsor).
- End of Day Quiz/Crossword Activity.
- Wrap-up of workshop & next steps for the project team.

Instructional Strategies

- Instructor led presentation of workshop slide pack.
- Facilitated breakout group/team sessions (capturing ideas/thoughts on whiteboard/flip chart).
- Team Building Activity – “CHAOS”.
- Possible guest speakers via CDROM videos from software vendors.
- End of day quiz/crossword to re-enforce content covered.

Learning Resources

- Powerpoint Slides (laptop/projector/screen).
- Participant Manual/Folders/Handouts.
- Whiteboard (printable) & markers.
- Flipchart & markers.
- Group activities & associated handouts.
- Workshop Evaluation Form.

Action Plan

- Agree time, location, attendees for workshop & invite participants. Arrange logistical items (ie. travel).
- Finalise design of workshop, slide pack & participant binder (incl. exercises & handouts).
- Source equipment for workshop & organise additional requirements (ie. lunch, morning/afternoon tea, toilet facilities, workshop stationery, etc).
- Setup & test workshop environment & equipment (day before).
- Delivery of workshop.
- Wrap-up & handover of materials to client for future reference.