

# Building ERP to Support Sales and Service Requirements

Our client recognized that to maximize the value of a technology implementation, it was important to drive it based on business process requirements – including sales and service.

***“With help from Adroit, we feel confident that we have the right team in place to get it right the first time and maximize the value of our ERP implementation. This will be a business driven initiative where success will be defined by more than just a ‘go live’ date.” – VP Operations, Mid-Market Manufacturing Company***

## **Business Issue**

The client had recently redesigned their go-to-market strategies, their sales team structure, distribution programs, pricing structure and their reporting requirements. It was important that these changes were incorporated into new ERP system.

The selected implementation team had little involvement in designing the new sales programs and limited experience in successful package implementations.

## **Adroit's Role**

Adroit was hired to lead the sales and service development teams and assist the business project manager in applying technology implementation best practices from a business perspective.

Stages in the engagement included:

- Development of product and customer data models that adhere to the new sales and marketing programs.
- Led design efforts for
  - Order Entry
  - Pricing and configuration
  - Demand planning and S&OP
  - Custom product development
  - Returns
  - Contact Management
- Assist in developing the project plan and implementation time frame.

## **Outcome**

The results of Adroit's participation led to:

An ERP design that was aligned with current and future sales and service requirements.

Communication so that stakeholders had a clear understanding of what was included in the rollout across the various implementation phases.

Solid testing processes to ensure that the sales and service business community was getting the functionality that they requested and needed.

A realistic implementation timeline and plan with clearly identified business requirements and linkage to strategic business initiatives.