September 6, 2023

ERP Journey: ERP Implementation & Optimization

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MEET

Our Presenters

Lindy Antonelli

Partner

Armanino Advisory LLC

Nicole Ripley

Director

Armanino Advisory LLC

Clint Whelan

Manager

Armanino Advisory LLC

Brandt Kucharski

CAO, Ethos
Former CAO, Grubhub
Industry Experience: 20 years

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KNOWLEDGE

Learning Objectives

Discuss the critical steps and strategies for a successful ERP implementation

Explain the importance of proper planning, including project management and resource allocation

Highlight the significance of change management and employee training during the implementation process

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Who is Armanino?

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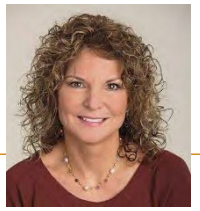


WHERE WE ARE

Our Locations

2500+ Employees | 18th Largest CPA & Consulting Firm

CALIFORNIA
- San Ramon
- San Jose
- San Francisco
- Los Angeles (2)
- Irvine
- El Segundo
- Woodland Hills
- San Luis Obispo
- Torrance

WASHINGTON
- Bellevue

COLORADO
- Denver

IDAHO
- Boise

TENNESSEE
- Nashville

TEXAS
- Austin (2)
- Dallas

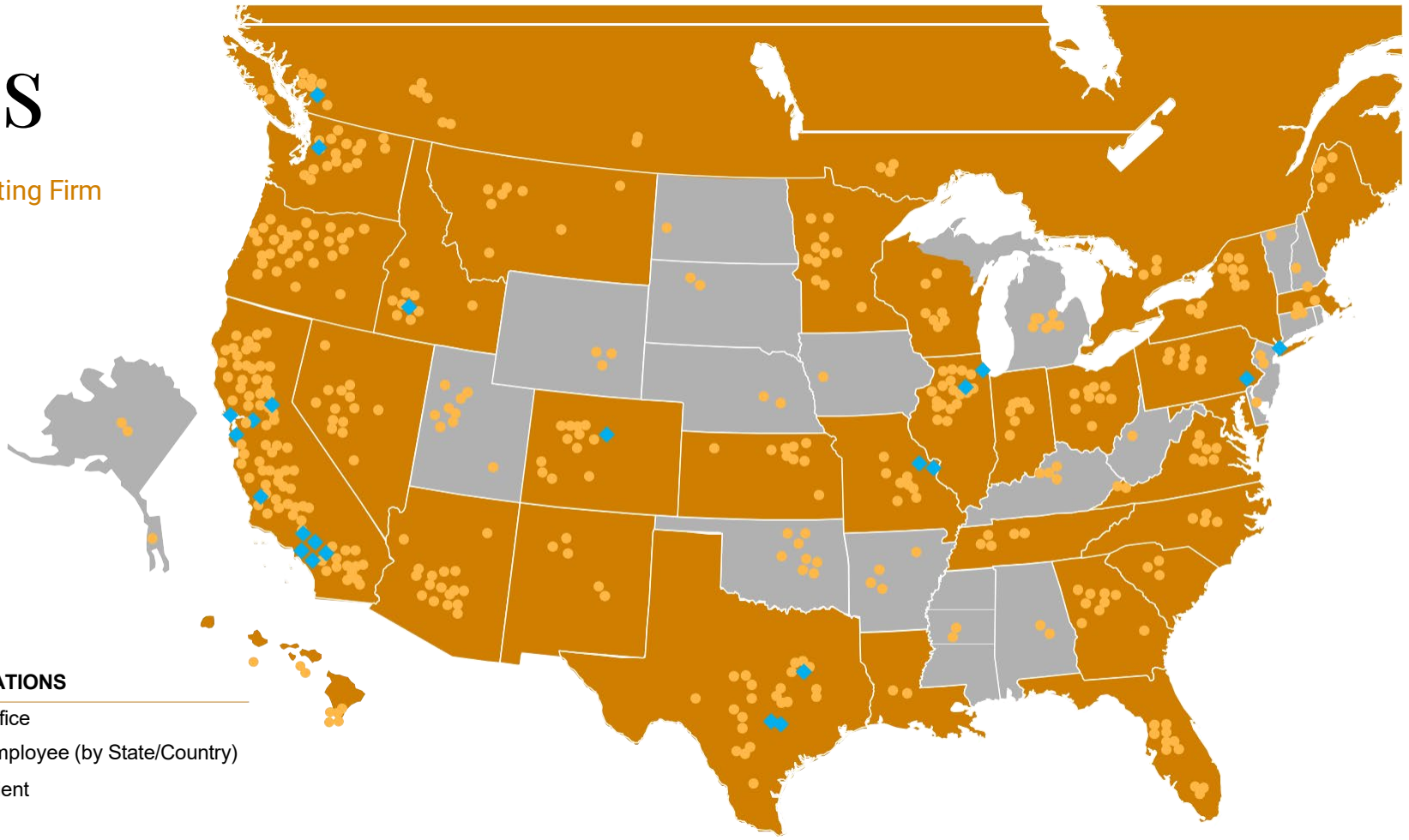
ILLINOIS
- Chicago
- Naperville

MISSOURI
- St. Louis
- St. Charles

PENNSYLVANIA
- Philadelphia
- Scranton

NEW YORK
- New York City

CANADA
- Vancouver



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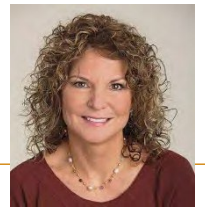


ARMANINO

Firm Overview

Count on Armanino to think strategically and provide sound insights that lead to positive action. We address not only your compliance issues, but your underlying business challenges.

Purpose

To be the **most innovative** and **entrepreneurial firm** that makes a **positive impact** on the lives of **our clients, people and our communities.**

Snapshot

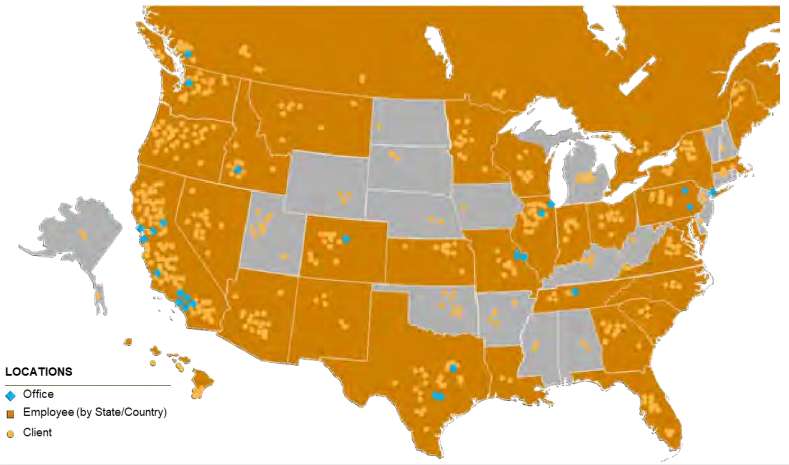
2500+ Employees

Team Members in 23 States

18th Largest CPA & Consulting

Largest Niche: Technology

Locations



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- Vancouver

AFFILIATE COMPANY

AMF MEDIA GROUP
an Armanino company

RECOGNITION & AWARDS

INSIDE PUBLIC ACCOUNTING TOP 100 FIRMS 2022

BEST of Accounting CLIENT SATISFACTION 2023

INSIDE PUBLIC ACCOUNTING BEST OF THE BEST FIRMS 2022

2017-2021 BEST of Accounting CLIENT SATISFACTION DIAMOND AWARD 5

Certified B Corporation

Bay Area Green Business

vault TOP RANKED

accountingTODAY 2022 VAR 100

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Implementation Methodology

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Client Roles & Responsibilities

Role	Responsibility
Executive Sponsor	Responsible for attending critical milestone meeting and ultimate decision maker for the project
Project Manager	Responsible for overseeing the implementation of the application. Helps plan meetings and should have a strong understanding of the overall goals of the implementation and ERP features/functions
Procurement Business Process Owner	Responsible for designing and approving business process flows for all procurement processes
Finance / Accounting Process Owner	Responsible for designing and approving business process flows for all finance related processes. Responsible for testing all accounting related transactions and processes for the implementation
IT Integration Owner	Responsible for managing the integration between ERP and internal systems

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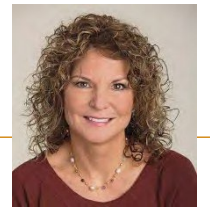

Implementation Methodology

	Plan & Analyze	Design & Configure	Test & Train	Deploy	Operate & Support
Armanino Primary	• Detailed project plan • Status reports (weekly) • Issues list • Project kickoff meeting • Walkthrough business process document • Integration requirements • Training plan • Refine estimate	• Review configuration based on business process review document • Solution review walkthrough	• End user training • Support user acceptance testing • Issue resolution	• Go-No Go • Cutover plan • Final data migration	• Go-live support • Post go-live support (first period close) • Intro to Managed Services
Client Primary	• Project kickoff meeting • Mobilize project team • Complete business process document • Identify business use cases • Create change management plan • Feedback on project plan • Requirements sign off	• Assign security roles • Solution review walkthrough • Validate data migration • Business scenario sign off	• End user training • User acceptance testing • Configuration sign off • UAT testing sign off	• Solution go-live • Perform manual data Conversion (as needed) • Validate data conversion • Go-live sign off	• Operate solution • First period close • Refine security model • Project closure sign off

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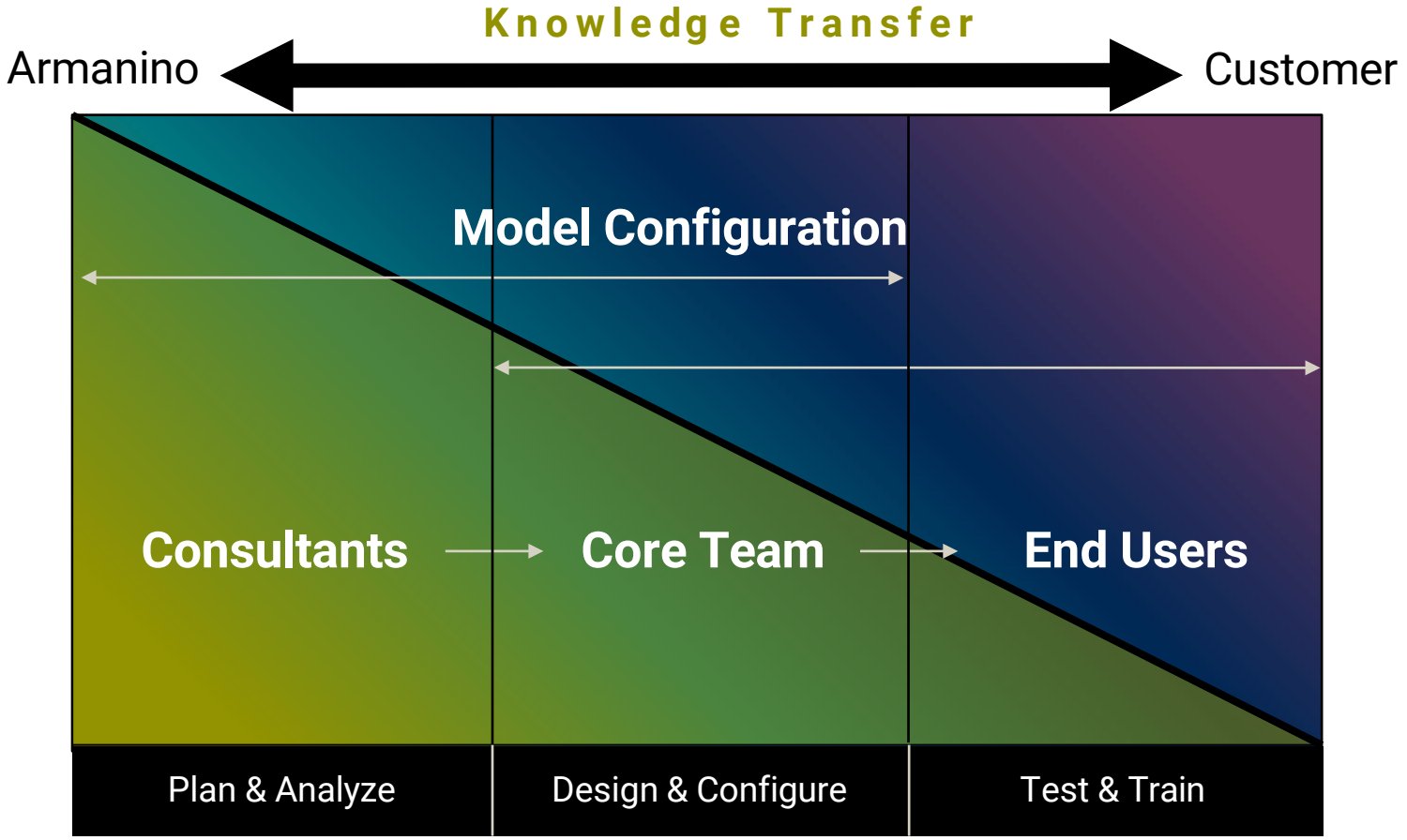
Implementation Methodology



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Ensuring Implementation Success

Project Management

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LEADERSHIP. ORGANIZATION. COMMUNICATION.

PM Fundamentals

ACCOUNTABLE FOR THE OPERATIONAL DELIVERY OF EXCELLENCE

RESPONSIBLE FOR SCOPE SCHEDULE AND BUDGET

SINGLE FACE OF DELIVERY FOR THE TEAM

PRIORITIZATION OF RISKS, ISSUES, DECISIONS AND WORK TASKS

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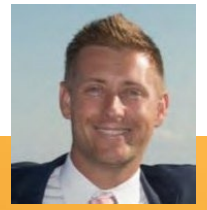

Orchestrating Success

Project Manager

Oversight

- Maintains Project delivery for key milestones & serves as main POC
- Manages resources & provides weekly project status reporting

Governance

- Assures quality and timely completion of project deliverables
- Ensures compliance to project budget and schedule reporting on status/budget/scope

Communication

- Develops project plan and estimates to plan/coordinate work activities and resources
- Proactively communicates with project team & project sponsors

Risk Management

- Proactively identifies scope issues and facilitates change management process
- Manages issue resolution process and risk mitigation efforts

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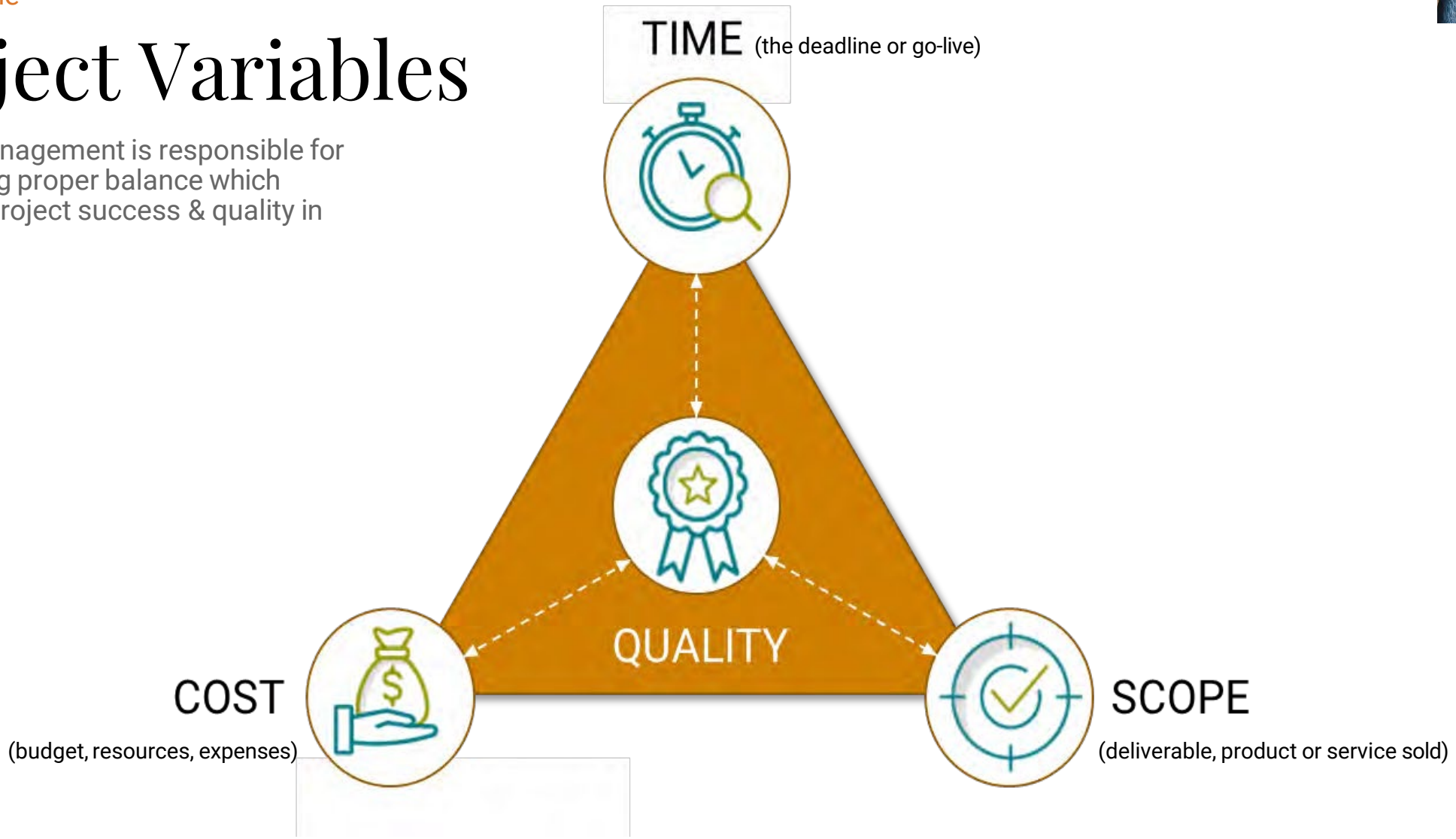
Iron Triangle

Project Variables

Project Management is responsible for maintaining proper balance which results in project success & quality in execution



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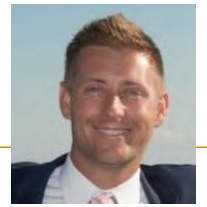
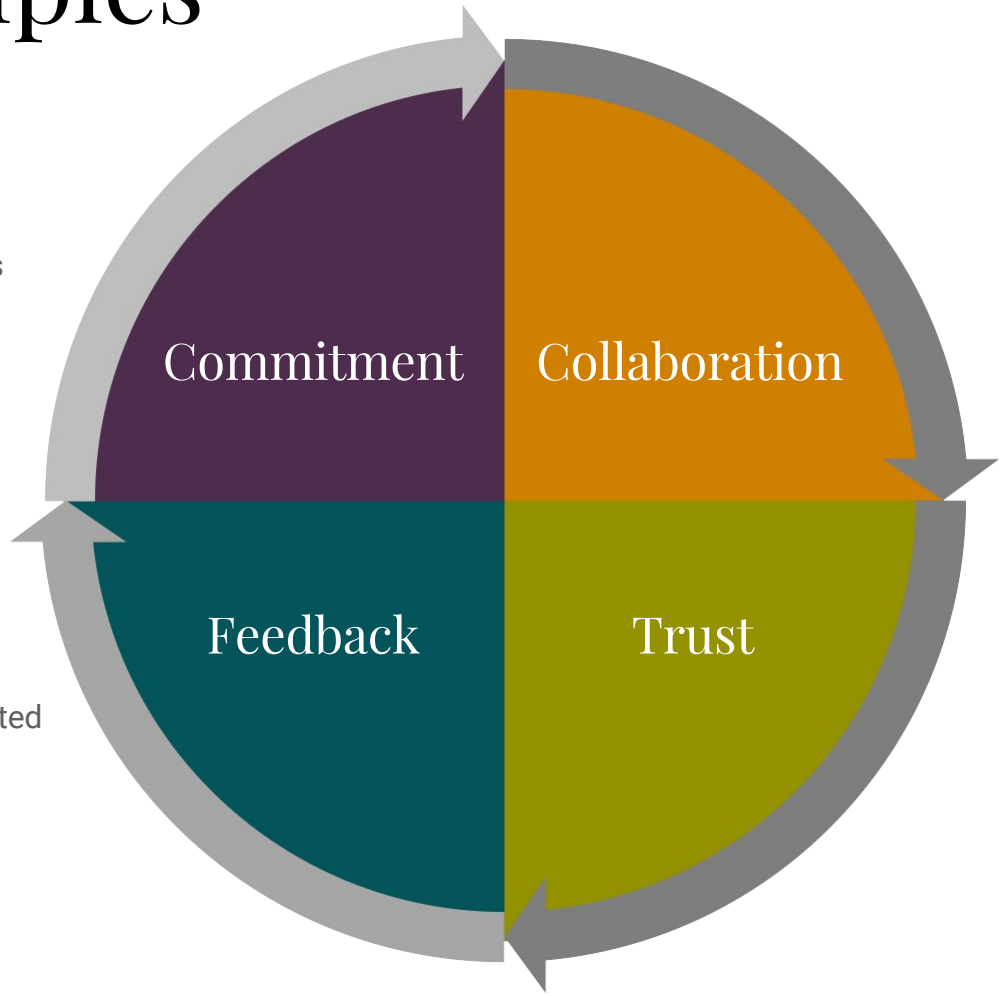


Project Principles

(1) Be present
- Attend meetings
- Monitor and update tasks
- Communicate blockers and risks
- **Challenge the status quo**



(2) One Team
- **Aligned** with common goals
- Sharing information and knowledge
- Using a common communication framework

(4) **Feedback** solicited
- Findings continuously communicated and applied
- Processes improved
- **Team empowered**

(3) Trust
- Allows us to rely on each other to achieve **project success**
- Increases engagement and overall satisfaction
- Enables honest feedback

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Managed Services

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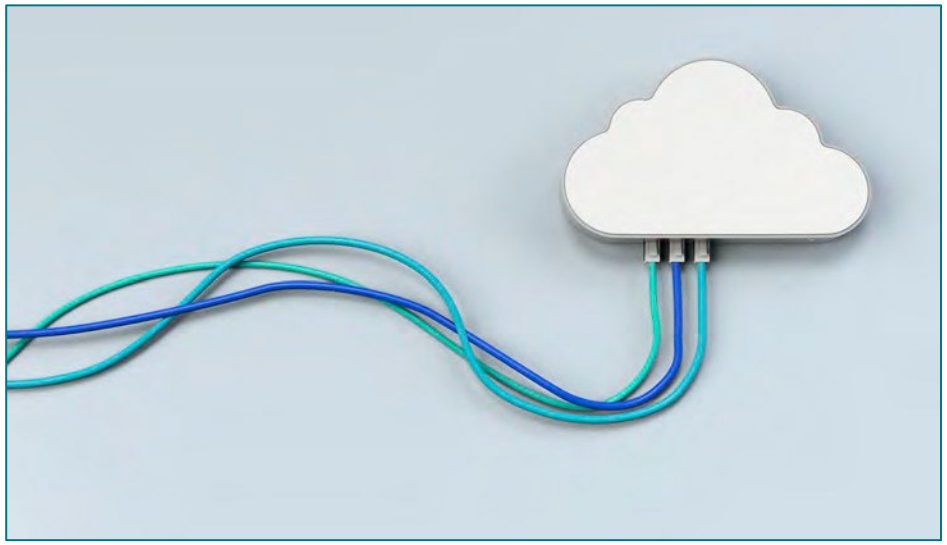

TECHNOLOGY

Managed Services Program

The Managed Services program is a proactive and strategic approach for managing your technology platforms. Our highly specialized functional experts provide the resources so you can optimize your **enterprise resource planning** (ERP), **customer relationship management** (CRM) and **financial planning and analysis** (FP&A) solutions, with bundled pricing that is cost-effective and predictable.

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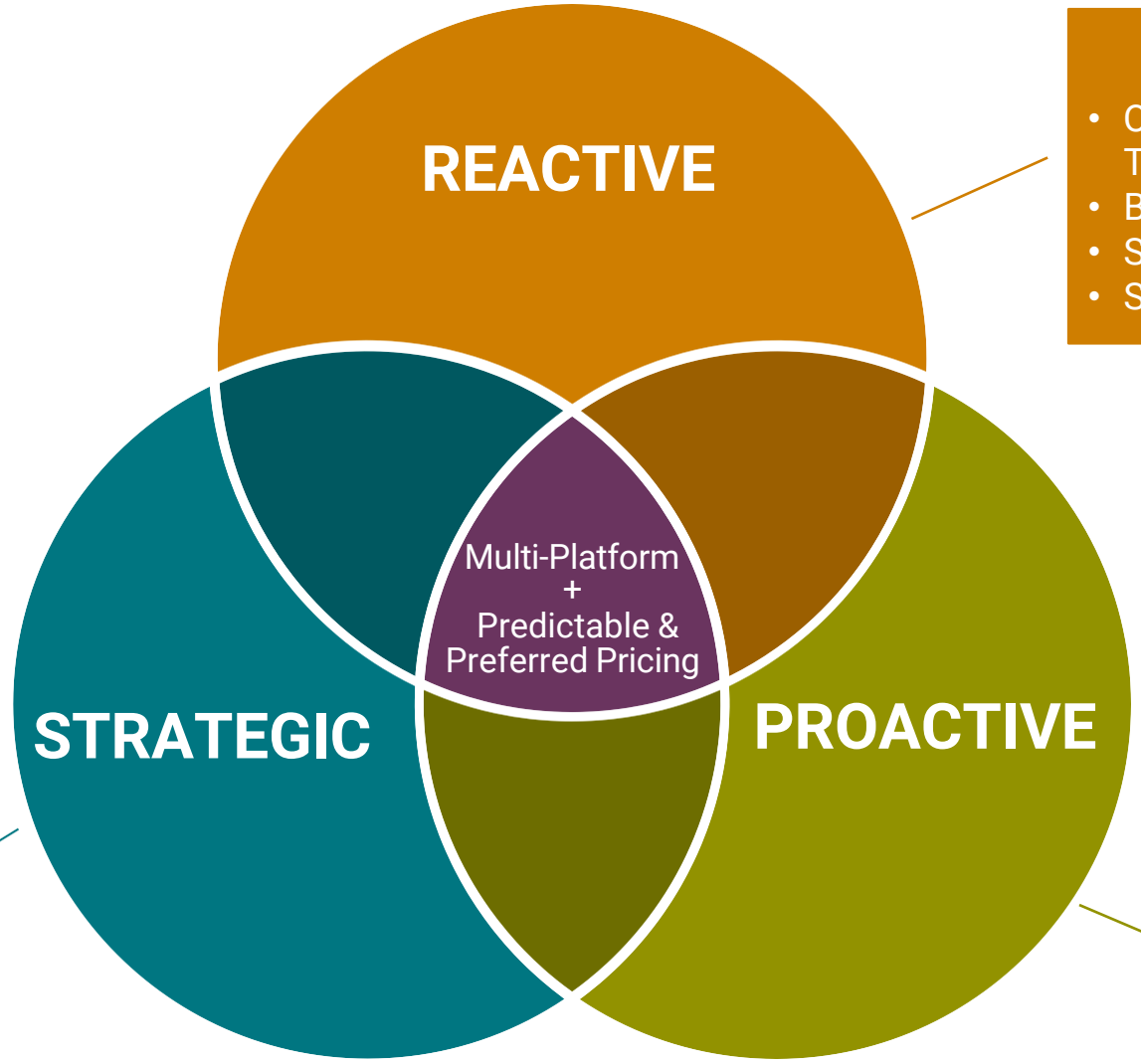
OVERVIEW

Managed Services Program



REACTIVE

- On-demand Functional & Technical Support
- Break/fix Tickets
- Systems Administration
- Service Level Agreement

STRATEGIC

- Armanino Expedition Sessions
- System Enhancement
- Strategic Planning

PROACTIVE

- Dedicated Managed Services Lead
- Steering Committees
- System Review
- Armanino Academy

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ROLES AND RESPONSIBILITES

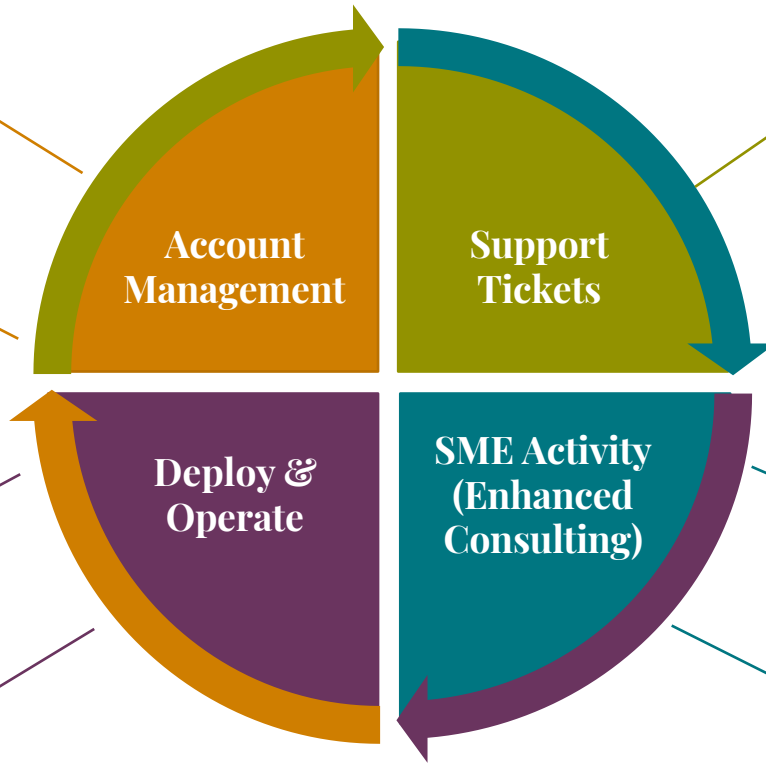
Engagement Methodology

Armanino
- Deliver service plan
- Track status
- Action items list
- Secure Armanino resources

Client
- Develop roadmap
- Discuss initiatives and priorities
- Identify and assign team resources

Armanino
- Cutover plan and deploy
- Go/No-Go
- Success metrics

Client
- Operations review
- Test and sign off



Armanino
- Customer success portal
- Tech support configuration
- Response time

Client
- Customer Success Portal
- Essential and Advanced Tickets
- Test and sign off

Armanino
- Manage releases
- Identify new features to deploy
- Small project solutions
- Reporting/analytics 3.22

Client
- Solution review
- Validate system/process changes
- Business scenario sign off

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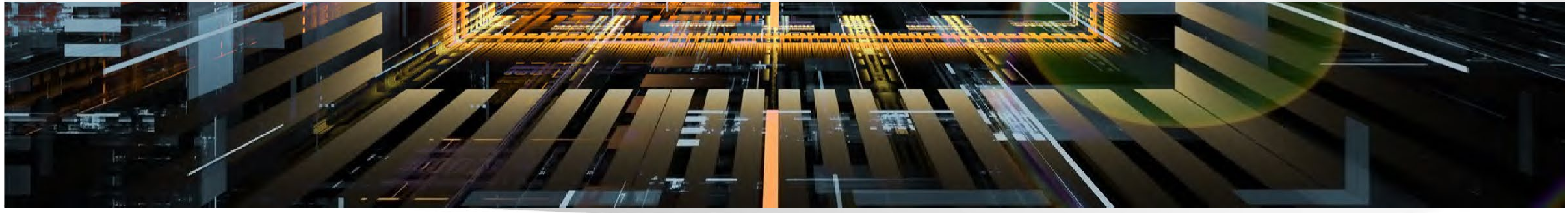
Additional questions?
Reach out to us at **Experts@armaninoLLP.com**



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