

19 Brilliant Ways to Promote ERP User Adoption



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Digital transformation has become essential to support people working remotely and to compete in a global, connected economy. That means upgrading business management systems has never been more important. And while ERP implementations have come a long way since the early days of multi-million dollar budget overruns and missed deadlines, they still require substantial financial and resource commitments from your organization.

To get the most impact from a business management solution, your team must understand and adopt the system quickly. Although today's software offers streamlined workflows and intuitive interfaces, even some tech-savvy employees tend to drag their feet during implementations.

So why is user adoption still such a challenge for organizations implementing new business management systems? There's no one easy answer. Employees may be resistant to change, training may be inadequate, change management may not have been well planned, or leadership may not be fully committed. In most cases, it's a combination of factors.

This white paper will share the knowledge gained through countless ERP implementations to help get your employees started on the right foot. Our team has shared best practices, critical warnings, and bright ideas to help you quickly realize the full value of your software investment. Read on to see how you can help your employees embrace change and take your organization to the next level.



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3. Manage Expectations
4. Train Effectively



Plan Thoroughly

1. Build an inclusive software selection team

Members of the ERP evaluation and selection team should represent a cross-section of your organization. In addition to leaders who understand the business objectives of the implementation, include staff members who can anticipate how the software will impact day-to-day operations. Ensure that each department or business unit feels their perspective is represented in the selection process.

POTENTIAL ROADBLOCK

"There will always be some users that are resistant to change. It is our job as a Partner to sell the system to the user that is struggling, just the way we sold the system to the company as a whole. When we can show someone how much easier their job will be because of this change, this is usually all it takes to get them on board."

– Dexpro Dynamics

2. Design the system to streamline current cumbersome processes

Take the time to clearly understand your business processes and re-design them to simplify and streamline your employees' work. Replacing tasks currently done on paper with digital processes that take just as much time won't win over your users. Design a system that will help employees accomplish more in a day with fewer headaches. Your implementation partner should be familiar with your industry and provide best practice examples to guide your workflows and business processes.



BRIGHT IDEA

"Anytime you implement a new ERP system or even part of a new system, you should use that as an opportunity to reevaluate your processes. Often a company will still be doing things the same way they did ten years ago because it still works. However, during that time technology has changed, their business has changed. Their processes can be improved to fit their current business and their vision for the future."

– Dexpro Dynamics

Plan Thoroughly

3. Plan ongoing support and training before go-live

Establish and communicate a clear plan for post go-live support and training. Users need to know that they will have help transitioning to the new system. Ongoing support and training will also keep users from establishing workarounds to avoid using the new system.

4. Maintain key integrations and customizations

Don't expect users to manually transfer or enter data that the previous systems handled automatically. Missing features and missing integrations are serious obstacles that users may be unwilling to accept. Integrations with other systems and customizations that meet specific requirements should be addressed early in the planning phase of implementation.

5. Map the employee journey

Before you define the data fields and workflows needed to improve your ERP system, you need to understand where you tend to lose time and productivity. By mapping your journey from start to finish, you can align processes to help guide your team—including triggers to launch automated processes focused on historic sticking points.



BRIGHT IDEA

"It is good to listen and get a sense of what each end user feels is important. Often you can make that happen. However, there will be times when someone's wants and needs won't fit into the vision for the future or the budget, so you must have a Partner that can prioritize and still keep the team unitedly moving forward."

– Dexpro Dynamics



Lead Proactively

6. Leadership must champion the project

All employees affected by the new system should have a clear understanding of why the project was initiated and the ultimate goal for the organization. The leadership team, from CEO to department managers, should be committed to that goal and be able to explain it clearly. Leaders should be supportive of employees efforts and remain fully engaged throughout the project

POTENTIAL ROADBLOCK

"When end users see that we have spent a lot of time on planning and strategy, they feel more confident that the project will be successful, and it is easier to get their support. Partners that rush the project upfront make users feel uncomfortable."

– Dexpro Dynamics

7. Identify an internal project manager and key users

Before the project begins, identify a project team and project leader from within the company. All team members should be empowered to spend appropriate time on the project. That may require a reduction or reallocation of current responsibilities. The project team should be well rounded and include members from various parts of the organization. Perspectives from each team should be considered from the beginning.



BRIGHT IDEA

"Automation makes people happy. When you can reduce the number of steps it takes to do a task, or eliminate a task altogether, it's very hard to find someone who is unhappy about that. If your users are struggling, find ways to automate."

– Dexpro Dynamics

Lead Proactively

8. Leverage “Superusers” and cheerleaders

A “Superuser” is typically an employee who is enthusiastic in learning and advocating the benefits of the new system. Superusers should be included or engaged by the project team to assist with training and communications. During the project, some team members will become cheerleaders for the project—embracing change and offering support. The project team should be on the lookout for these employees and have a plan and leverage their enthusiasm and knowledge to help others.

POTENTIAL ROADBLOCK

“People have different learning styles, and it is helpful to provide several training options. For example, training that is live, recorded or in a printed form. Asking every user to learn the same way is not going to lead to the best user adoption.”

– Dexpro Dynamics

9. Prepare to be flexible

During an implementation there are likely to be unexpected challenges and opportunities. Assure everyone involved in the ERP implementation project that changes are to be expected and will be managed thoughtfully. Project team meetings should address potential changes and leadership should be fully informed of possible impacts.



“Investing in someone within the company to become a power user is beneficial for both the client and the Partner. Companies who miss that step create an unhealthy dependency on the Partner that will be a source of aggravation and expense down the road.”

– Dexpro Dynamics



Manage Expectations

10. Maintain consistent, continuous communications

To keep everyone informed—from leadership to front-line users—establish regular communications channels. Project updates should be honest and informative to help users feel included in the entire process. Consider using a Teams site to promote discussions, answer questions and provide an “always-on” location for project information.



“Once the power user understands the change and the flow, they usually embrace the new system quickly and can even take it to a new level. Then they become the biggest advocates and bring the rest of the internal team with them on board.”

– Dexpro Dynamics

11. Establish metrics for goals and expected outcomes

The defined goals of an ERP implementation project should be clear and measurable. With mile markers, the project team can monitor and report on success. As decisions are made during the planning and execution phases, defined metrics provide guideposts to keep the project aligned to the desired outcomes.

12. Recognize the potential impact on employee workloads

An ERP implementation will require significant time from project team members and users. Employees should not be expected to maintain their full-time job responsibilities in addition to planning, testing and training. Put plans in place to offset workloads, e.g. reduce regular work, get support from other departments, hire temps, or some other method. Give employees the time they need to fully focus on their implementation assignments.

POTENTIAL ROADBLOCK

“Some users will resist the new ERP system because they are afraid it will make their job obsolete. It is critical to identify this as the core issue and resolve it with management before that user can move forward.”

– Dexpro Dynamics

Manage Expectations

13. Explain the business case for the project

Spend time building a clear business case to help users understand why they are being asked to support the implementation of a new ERP system. By providing employees with the “why” as well as the “what,” leadership will establish a more inclusive environment that will promote user adoption.

14. Promote patience and tolerance during the project

An ERP implementation project can be stressful for many of the individuals involved. Project teams must make difficult decisions that not everyone will agree with. Department managers will be facing additional stresses to get regular work done despite significant distractions. Users may be nervous about learning new systems or having their jobs become redundant. Everyone faces personal issues that may not be apparent. Patience and tolerance for missed deadlines or mistakes will go a long way in supporting user adoption.



“To be successful, most projects should have both a power user and a project manager within the company. These roles are completely different. The project manager should be just focused on goals and deadlines. A power user should be focused on the functionality of the new system and how it relates to their business processes. When you have someone in both these roles, you can lower the overall project cost.”

– Dexpro Dynamics



15. Provide an overview walkthrough before training

Help users understand the big picture so they can understand how their role contributes to the process. Explain the ERP processes—including flow charts if appropriate—that span across the organization to provide context for users. In addition to helping with the initial adoption of the system, a broader perspective may help users see how they can extend the system to streamline operations in the future.

16. Address potential concerns of automation

Users will balk at learning a new system if they think it might replace their job or devalue their work. If automation will redefine their role, users need to understand precisely how they will fit in and what their responsibilities will be. Demonstrate how the new system will benefit them specifically and how their effective use of the application will make their work more productive and fulfilling.

17. Use terminology and examples that employees understand

During training sessions, use industry-specific terminology instead of generic examples included in vendor training data. If your organization uses the term “bill” instead of “invoice” users could be confused. Populate testing and training data with actual company data to help employees identify with the situations. When using actual product or customer names, lessons are much more likely to be understood.



“We are not flexible on skipping the testing phase of the ERP implementation, and we demand individual sign-off. Once each user realizes they have to sign their name to show it has been completed, they know they have to take ownership. Testing is a technical process, but it is also the best way to make the end user more comfortable and confident using the new system.”

– Dexpro Dynamics

Train Effectively

18. Offer a variety of training options and support

Support all learners by providing a variety of training options. Some people will prefer in-person, hands-on training and some will prefer to move at their own pace. Video recordings of live sessions support both paths and can provide a resource for new hires after implementation. Set up a Teams site that provides a central location for immediate and accurate answers and training-related discussions. Not only will it keep business moving during the cut-over, but it will also help end users feel supported as they work in the new system. Leverage superusers to help other employees in their business unit with on-the-job training and coaching. Superusers provide a familiar face to answer questions and help with troubleshooting.



BRIGHT IDEA

"You want to choose a Partner that will closely monitor progress and keep your team accountable. When they see that testing is being skipped or deadlines are missed, this is not the time to be diplomatic. It is time to give the wake-up call that your project is in danger."

– Dexpro Dynamics

19. Take full advantage of video communication

As the number of people working remotely continues to climb, the value of video training and communication has increased. For most organizations, user testing and training sessions will include employees working from home. By hosting sessions in real time with a tool like Microsoft Teams, you'll enable two-way communication that can provide valuable visual feedback. Facial expressions and body language are key indicators of users' comprehension and adoption as they participate in training sessions.



When it comes to user adoption, experience counts!

At Dexpro Dynamics we are proud to be a Silver Competency Microsoft Partner. We are big enough to have a team to handle your needs, yet small enough to give you the personalized attention you deserve.

Our goal is to make the system work for the user, not the user work for the system. Unlike many assembly-line firms, we pride ourselves on personally getting to know our clients and familiarizing ourselves with their needs. We can then tailor our approach to serve your business and support your unique business processes.

We spend the most time upfront. Defining the plan and the strategy will sometimes be more time consuming than all the remaining steps of the implementation. This approach means that instead of fixing mistakes, we take one shot and hit the target. When you work with Dexpro Dynamics your users will feel confident the new ERP system will make their daily jobs easier, and help the company reach its vision for the future.



Free Microsoft Dynamics GP System Assessment

We offer all customers a free high level Dynamics GP system assessment.

This will allow users to get another perspective as well as gain valuable information about their system at no charge. We focus on pointing out system capabilities and reporting that client already owns. We also will list risk factors as well as suggest best practices. We want your company to thrive and will provide you with the solutions and tools that you need to succeed.

[Contact us for a free Dynamics GP system evaluation.](#)



About Dexpro Dynamics

Dexpro is a leading provider of Microsoft Dynamics solutions. Our primary focus continues to be Microsoft Dynamics GP consulting and support, but we also offer:

- Dynamics 365 for Sales (CRM)
- Dynamics 365 / ERP and Dynamics Business Central
- Microsoft Power Platform (Power BI, etc)
- Integration with ISVs, Office 365 and other apps

Every member of our team of Dynamics experts are experienced senior level consultants who have vast experience with Dynamics. Our Dynamics consultants give back to the Microsoft Partner Community by:

- Speaking at Microsoft Conferences
- Writing books about Dynamics
- Leading Dynamics User Group sessions
- Participating in Dynamics online communities

Our team's experience is second to none in the industry allowing us to deliver the best solutions at a competitive price. Every hand-picked individual on our team has extensive knowledge and experience that covers the functional as well as the technical parts of the system allowing us to provide solutions specific to the business needs of your organization.

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