

Surviving the Migration: What AP Needs From an ERP Implementation That IT Won't Tell You

Presented by: Christine Battles AP Manager

APS, APM, APPM

Symbotic, LLC

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Surviving the Migration: What AP Needs From an ERP Implementation That IT Won't Tell You

ERP implementations are usually run by IT and consultants who understand the system, not the daily reality of AP.

This session covers what AP leaders need to fight for at the table: data mapping decisions that come back to haunt you, workflow and approval logic that gets lost in translation, parallel-run strategies that actually catch problems, and how to keep the AP team functioning during go-live.

Actionable Takeaways

- Know which ERP decisions AP must weigh in on before they're finalized, not after
- Anticipate the most common AP workflow breakages during go-live
- Manage team productivity and morale through a multi-month implementation

What IT Doesn't Tell You

1. The Software is Rarely the Hard Part – Changing habits, established responsibilities
2. Requirements Are Never Truly Complete – Exceptions, workarounds & undocumented processes emerge
3. Data Clean Up Takes Longer Than Expected – Duplicate Vendors, Missing Info, Inconsistent Naming Conventions, Outdated/Stale Record
4. SME's Have Day Jobs! – Resource time is often under-estimated
5. Training Is Not the Same as Adoption – Where to click/how to execute vs. routine behavior changes
6. Go-Live Is the Beginning, Not the End – Start of Stabilization
7. Customization Comes with a Cost – Future Maintenance/Upgrade Challenges
8. Executive Sponsorship Matters More Than Technology –Employees take cues from Leadership
9. Communication Problems Cause More Delays than Technical Problems – Expectations are missed, time is wasted, document decisions, changes, action items, and assign owners
10. Perfect Systems Don't Exist – Compromises are required

Decisions, Decisions.....

1. Which Decisions does AP needs to weigh in on before they're finalized?
 1. All of them!
 2. AP needs a seat at the table from the inception of the project
 3. Solution Selection, Project Resources, Process Mapping, Thresholds, Approval Requirements, Compliance Requirements
2. Consequences if Excluded
 1. Assumptions are made (Process > Compliance)
 2. Operations/processes need to be re-visited changed and retro fitted or forced to fit into a new process, otherwise negating potential effectiveness or efficiency benefits

Common Breakages

1. Communication; Clear expectations need to be established with ALL of the RIGHT People (Core Team members should be included on EVERYTHING)
2. Discussions affecting change can have a down or up stream impact
3. Breakdowns in communication lead to misunderstandings and in some cases missed requirements – potentially delaying progress
4. Customizations – Limit
5. More than the “Happy Path” - Exceptions, Errors, Urgent Requests, Complex & Unusual Transactions
6. Compliance Requirements
7. Workflow misses/challenges (PRs, POs, Invoices & Payments)
8. Multiple Approval Levels

Managing Team Performance

1. Change Management
 1. Engage the team and communicate often
 2. Overcommunication is better – mitigate surprises
 3. Show and discuss changes directly impacting current processes
 4. Change is difficult, provide adequate time to absorb
2. Morale
 1. Change Management has a huge/direct impact on Morale
 2. Morale has a direct impact on Productivity
3. Productivity
 1. Define and determine the KPI's you track today or want to track in the future and report

Truth!

The most successful software implementations are NOT technology projects.

They are business transformation projects, supported by technology.

Technology can enable change, but PEOPLE determine success.

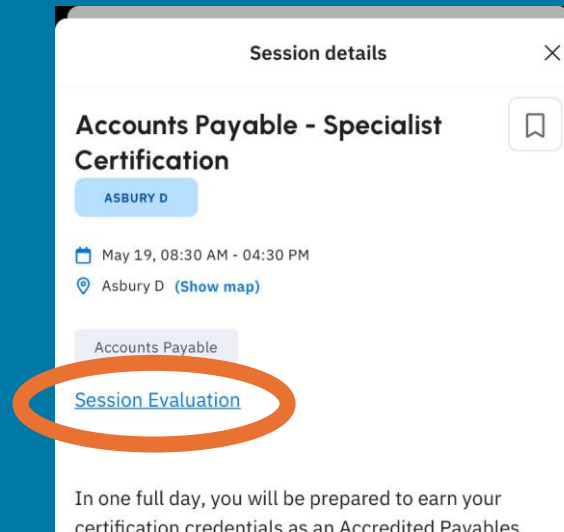
For Accounts Payable teams specifically, the strongest implementation strategy is to focus on:

1. Clean vendor and invoice data
2. Clearly documented processes
3. Strong user adoption and training plans

If these areas are managed well, technical challenges are also manageable, however if they are ignored, even the best software implementation will struggle to deliver its promised value.

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{Last Slide - Speaker contact details }

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