Strategies and Experiences on Global Roll-Outs

Same challenges as a local implementation
..but with some additional pitfalls.

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Background

I have been part of the Infor community since 2012. Currently working as project manager and solution architect for Infor LN implementations and optimization projects.

During the years I have been involved in projects within industrial manufacturing, automotive, aerospace, defense and maintenance.

Successes and failures has led me here.

Midport is the business-focused supplier of standard ERP, EAM and related business systems in the Nordics. Being able to manage critical business processes with today's business systems goes far beyond IT. This is what we do best.
We make complex things manageable and easy to understand!
Privately owned company established 2003
EAM and ERP Specialist within

> Maintenance, Repair and Overhaul (MRO)
> Project-centric industries
> Manufacturing
> High tech & Electronics

- **Local competence, Global expertise**

> Located in Stockholm, Oslo, Malmö, Helsinki & UK
>
> 75+ skilled consultants
>
> 50+ customers
>
> Service delivered in 30+ countries worldwide

- **Infor and Hexagon Partner**

Some of our customers

Midport Scandinavia

VR FLEETCARE

Valmet FORWARD

Detection Technology

EuroMaint

Boskalis Terramare

CARGOTEC

NTM

LOGSET

ABB

Struers
Ensuring Certainty

HUHNSEAL

MMA

VOLVO

ScandiNova

ALVA

The foundation

- Understanding the need for change
  - What is the driver for change and what is the target?
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- Different types of drivers
  - Legal requirement – Accept and implement – No arguments
  - Business requirement – Validate, prioritize and implement
  - Cost control – Value Stream Mapping
  - Political reasons internal / external – Risk management
  - Security – Has current platform reach end of life due to increased risks?
  - Technical reasons – Has current platform just reach end of life period.
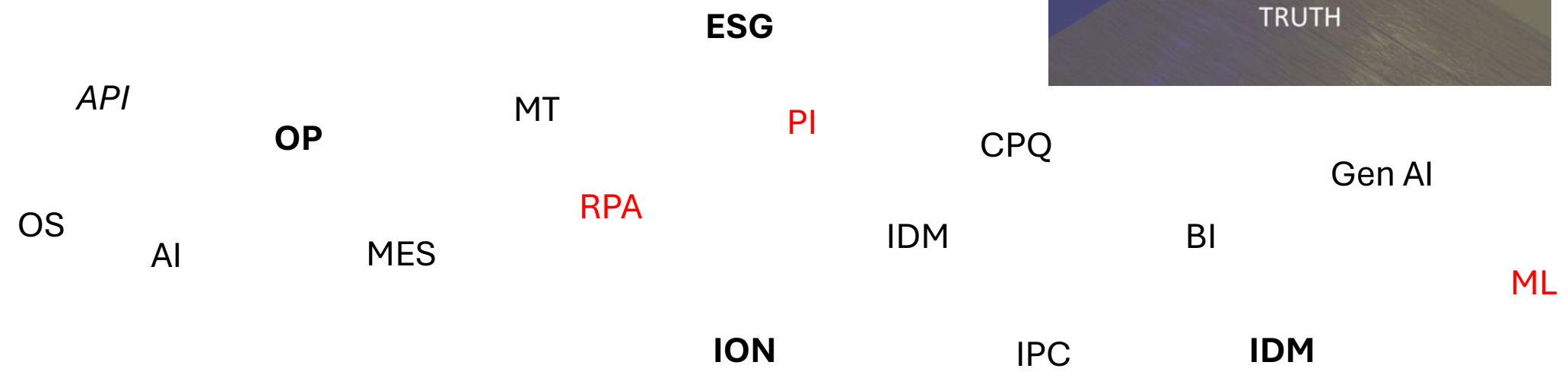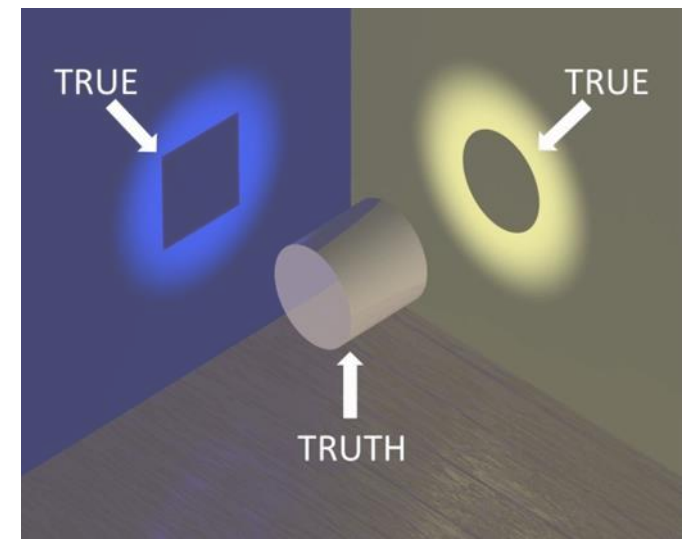
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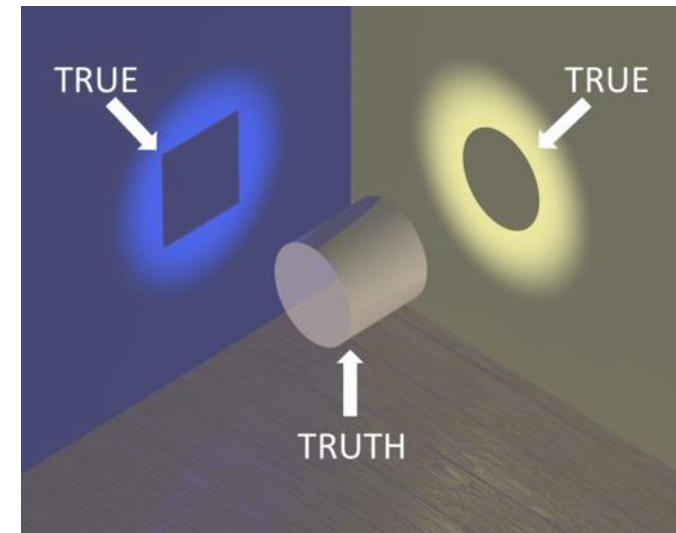
- Communication
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  - Many different roles and experiences. Can we talk and understand each other? Do we understand the same information in the same way?
 - Usage of TLA?

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ESG

API

MT

PI

OP

CPQ

Gen AI

OS

RPA

IDM

BI

AI

MES

ML

ION

IPC

IDM

The foundation - Multisite

- **Understanding the need for change**
  - Is the driver for change the same on all sites?
- **Communication**
  - Cultural differences – Do everything mean the same?
  - Background differences – For each new site, we need to take a step back and reestablish the baseline.
  - Language barriers
- **Resource commitment**
  - Management commitment on new sites
  - Local resource commitments
- **Change handling**
  - New processes
  - Process deviations
  - Change requests
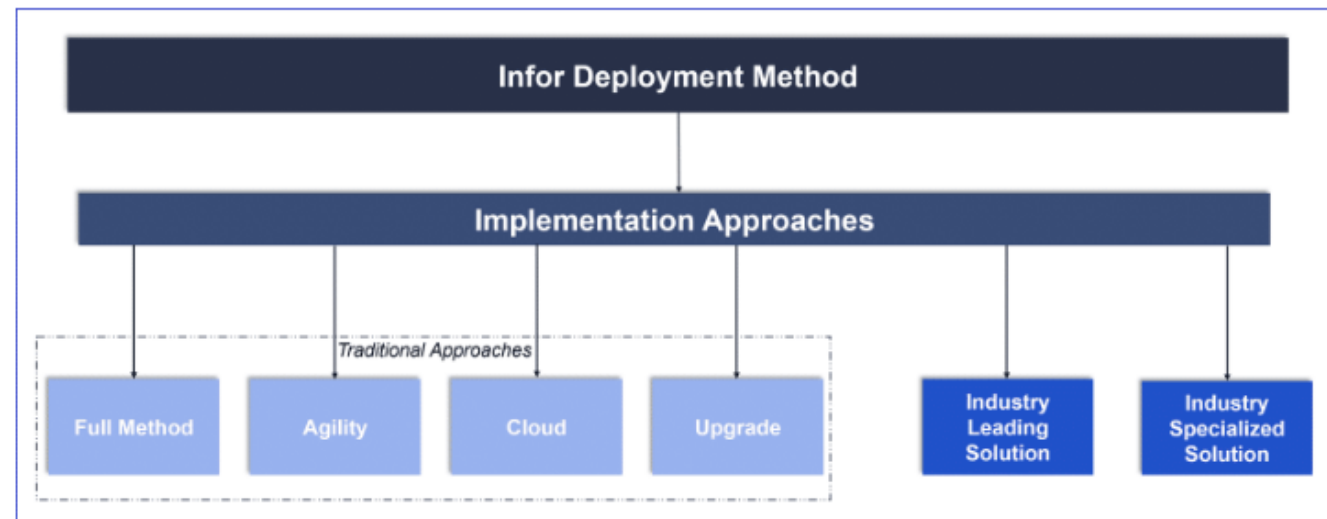 - Local legal requirements
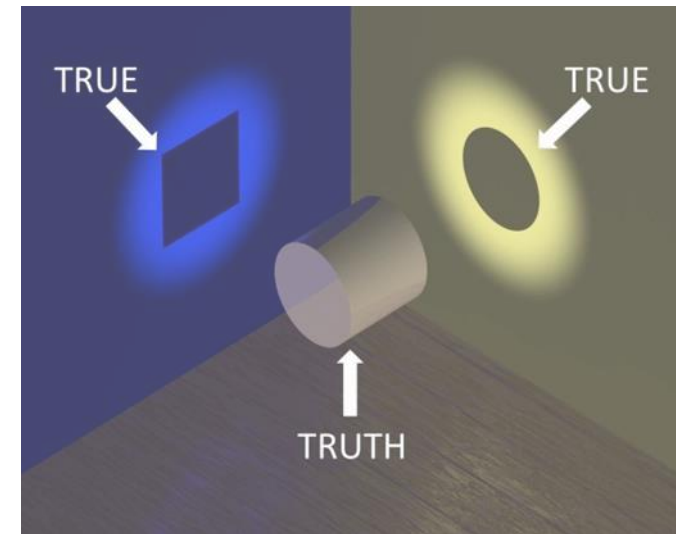
"There is nothing wrong with CHANGE, if it is in the right direction"

Winston Churchill

Some supporting tools

- Infor Process Intelligence to accelerate implementation.
- Infor Deployment Method.
    - Project can be based on IDM but with some deviations.
   - Multiple approaches are available to support the project that is about to be started.

Those are my principles, and if you don't like them... well, I have others.

(Groucho Marx)

izquotes.com

Project control and follow-up

- Credible, measurable & relevant metrics to measure achievements

- What factors are critical for a specific capability to be successfully exploited? What do you have to get right?

- Capability body of knowledge

KPI's

Critical Success Factors

Templates, Standards, Patterns & Practices
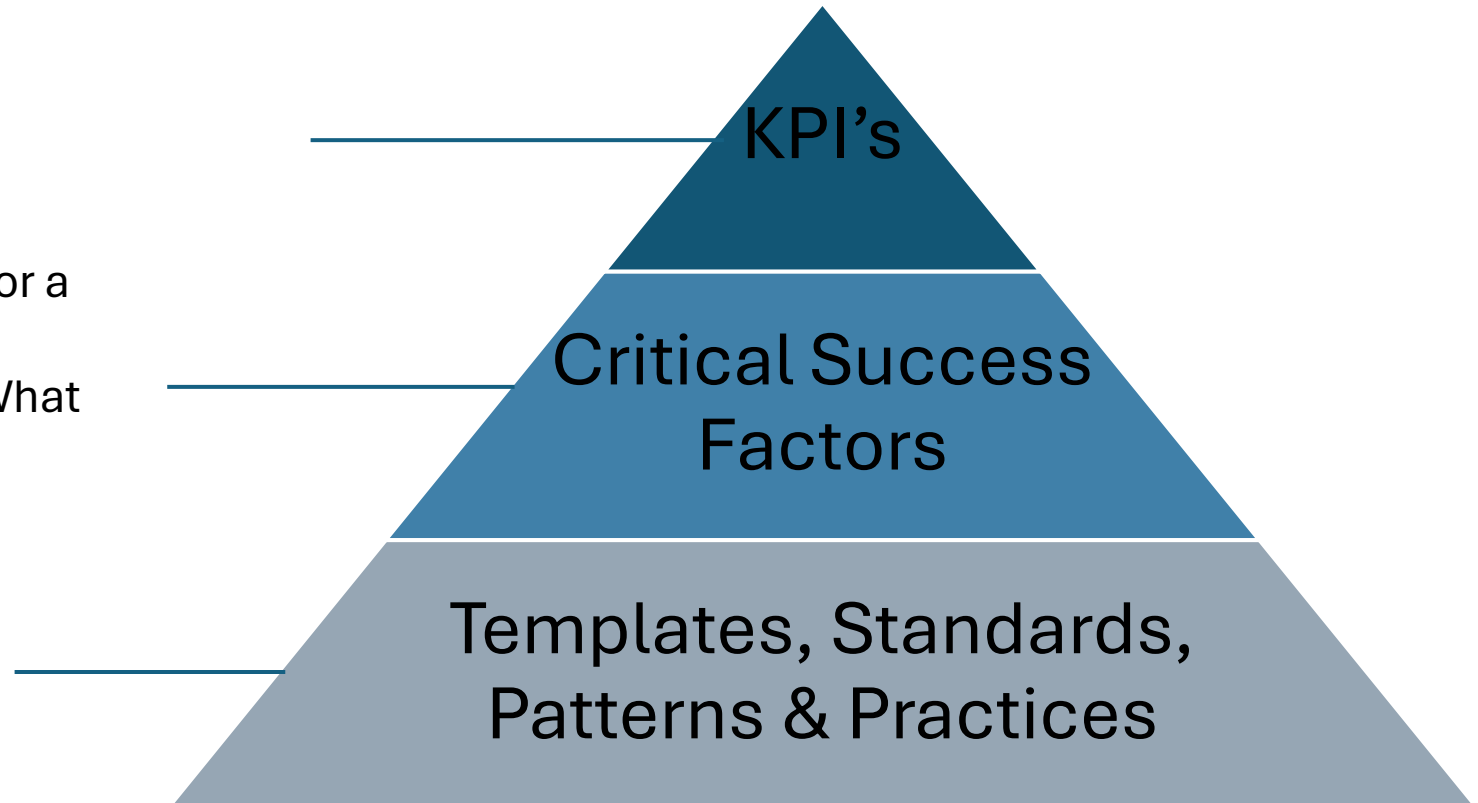
Project planning

- Define and agree on scope, and set the project deliverables accordingly
- Realistic time plan with buffer areas to mitigate obstacles or delays
- Set achievable milestones

- Those key steps are the same no matter if you are running a global roll-out or a single implementation/upgrade project.

The importance of smaller steps
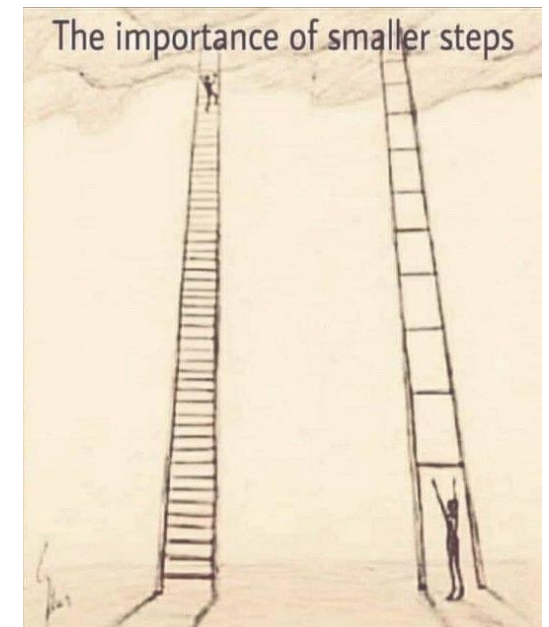
Process Mapping

- Why Process Mapping?
  - To visualize the process and align the key stakeholders.
  - A powerful tool to identify potential areas for improvements, business risks, or waste
  - Tends to facilitate quicker decision makings
  - Can be used for training/coaching, performance metrics or a precursor to Value Stream Mapping.

  - A process mapping to some degree enables good discussions and process understanding and if possible should always be executed.

- Challenges for a global roll-out
  - How do we find the relevant sites and what processes should be mapped at what site.
  - If all processes should be mapped at all sites, it will take a lot of time.
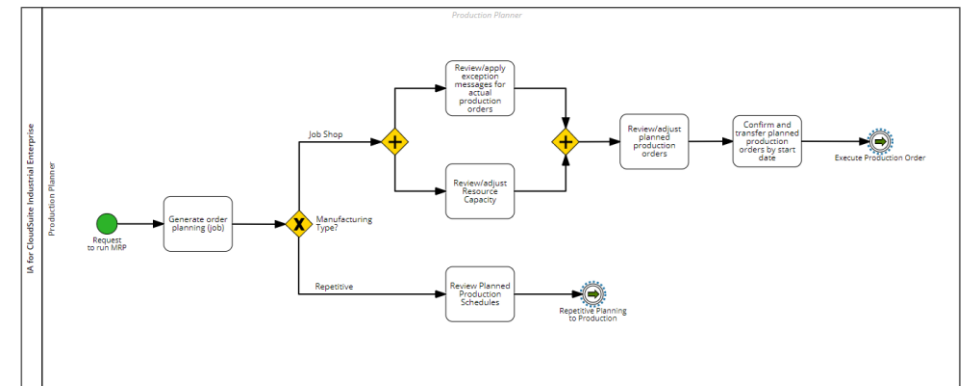
Level of standardization and documentation

- How standardized should the rollout be?
  - Should extensive work be done in a pilot phase and most central parameters and coding to be locked for changes?
  - Or should pilot phase mostly focus on establishing main processes and core integrations. Remaining of detailed coding is up to each individual site?
  - Bad global coding causes more harm than it helps. If not done properly the project team and each site has to fight this for every single roll-out.
- Keep standardization to a reasonable level.
  - If unique processes and products on multiple sites, then lower level of standardization.
- If same product/process is present on multiple sites then more things can be standardized.

Cost, Control & Collaboration

- Statement of Work
  - Put a price on the project.
  - Define what is included, but more important, what is not included.

- Budget follow-up
  - Keep track of your budget. Monthly follow-ups to track progress and spend.
  - Highlight cost drivers and propose mitigating actions.

- Tracking of deliverables
  - If possible, it is normally helpful to use some kind of tool to track time usage on different activities. This allows for better follow-up to understand where time has been spent and also to improve future roll-out estimations and effort planning.

Functional Scoping

- Make sure to have a clear scope for each individual site.

- Good exercise that both shows capabilities and creates understanding of requirements.

MAKE	SHIP	FINANCE: Mgmt. A/C's	FINANCE: SUB-LEDGERS
Assembly / Manufacturing Planning	**Goods Shipment**	• GL Postings	**Accounts Payables**
• Determining what to make (MRP)	• Finished goods inspection	• Inter company trading	• Supplier data
• Determining what to make (MRP) Spares			• Invoice entry, match & approval
• Plant / work centre scheduling	• Inter site transfers / cross doc	• Cost accounting	• Expenses submission / approval
• What if change analysis (raw mats)	• Allocate & pick confirm (status view)	• Inventory accounting	• Selecting invoices for payment
• Support of lean, Jit, Kanban, etc.	• Packing activities	• Budgeting / financial planning	• Payments
• Alternative materials	• Shipment planning	• Tracking actual to budget	• Evaluating GRNI
• Customer Furnished Material	• Transportation planning	• Fixed asset control & depn	• Enquiries
	• Shipment documentation	• Payroll journal (monthly)	
• Sub-contracting	• Customer returns /complaints /claims	• Period end processing	**Accounts Receivables**
Assembly Control / Manufacturing Execution		• Multi-site consolidation	• Customer data
• Shop order management	• Source / Destination Inspection	• Intercompany recharge	• Invoicing
• Shop order paperwork	**SERVICE**	• Formal financial reporting	• Credit notes
• As-Built registration	**Service Offering Activities**	• Tax / Intrastat	• Statements
• Operation activity data capture	• Service offering development	• Risk & Compliance	• Control controls (e.g. stop shipment)
• Scrapped material control	• Service contracts / agreements	• Standard costs	• Receiving
• Downtime capture	• Contract price management	• Overhead allocation	• Enquiries (Aging analysis)
• Quality: specification control	• Warranty management	• Shared Services	**Cash Management**
• Quality: product performance test	• Data Management	• Reporting	• Bank reconciliation
• Rework	**Call Mgmt. & Job Specification**	• Analytics	• Cash flow projection
• Energy usage tracking	• Call taking	**ASSETT MANAGEMENT**	• Net Debt reporting
Inventory Management	• Inspection & quotation	**Maintenance Process Review**	• Head office cash flow forecast
• Issue / return of raw materials	• Incident tracking & enquiries	• Asset master record keeping	
	• Preventative maintenance mgmt.		
• Barcoding support	• Special Care Claim management & approval	• Asset maintenance strategies	
• Raw material consumption	**Service Execution**	**Execution**	
• WIP visibility	• Modifications	• Inspection & breakdown alerting	
WAREHOUSE	• Service planning		
	• Activity recording (time, materials, expense)	**Additional functionality**	
Warehouse Control	• Billing	• Ming.le Enterprise (Social)	
• Advance knowledge of goods	• Parts inventory management	• Infor Document Management	
• Mobile devices (e.g. bar coding)	• Parts supply	• Infor Document Output Management	
• Location placement controls	• Work flow Management	• Infor ION worklow and monitors	
• Traceability (Serial, Lot)	• Globalization (intercompany)	• Infor Reporting Designer	
• Stock checks (full / PI)	**Freight Management**	• ION & ION API	
• Inv. location visibility / enquiry	Freight Order Control	• Birst	
• Quarantine inventory	Freight Order Planning		

Functionality in scope

Under evaluation

Out of scope

Governance

- How will the project take decisions?

- Who need to be part of decisions?

- Who need to be informed?

- Importance of a clear governance model
  - Without clear structure same decision need to be made several times.

- Change request handling
  - This need to be handled both on global and local level depending on the type of change.
  - The more detailed data-coding that is in use, the more cases there will be for global decisions, agreements and approvals.
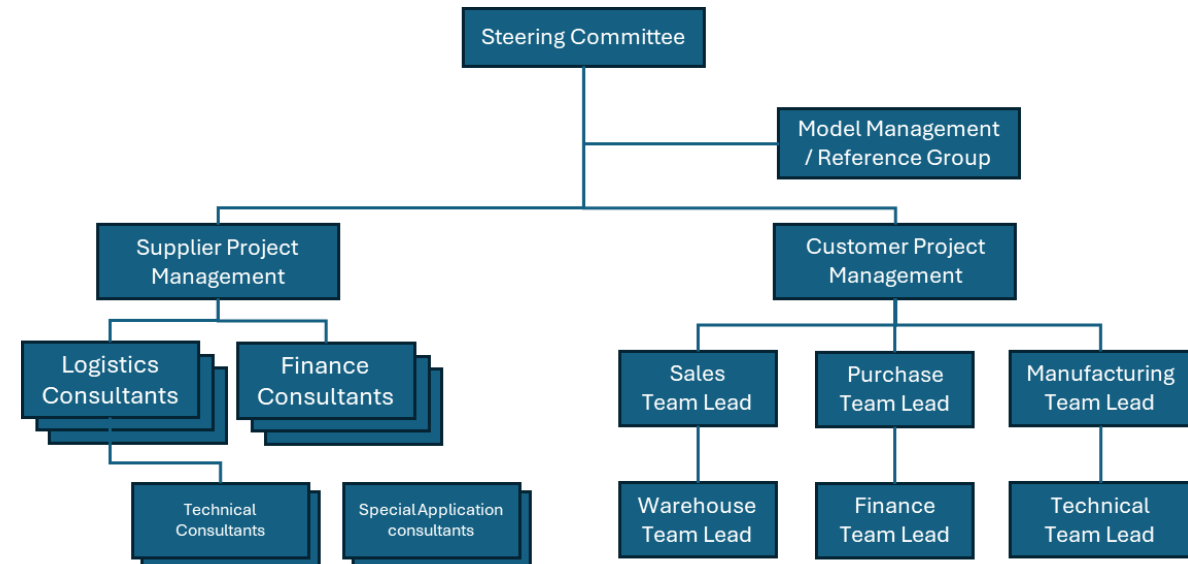
What to do and not to do

Avoid customisation and deviation from standard solution	Integration complexity is underestimated	Lack of project objective governance during execution, i.e. scope creep	Lack of focus on change management
Limit customisation of (system) existing workflows	Deficient communication within the project and within the customer's organisation	To succeed with the introduction of new technology such as AI	Data conversion activities are under-estimated and start too late
Underestimation of internal resources needed for the project	All required roles in the project are not filled	User are not trained sufficiently and to the right level	Development of reports and forms are underestimated
Too few people with business knowledge participate in the project	Management is missing focus and engagement in project	To have margin from the start in the project budget.	Limited quality assurance during project
System test is executed with limited scope and without structure	Inability to handle supplier's insufficient competence	Risk analysis is not performed consequently	Challenge the need for local deviation from global template

Experience

- Management commitment and leadership
  - To implement any type of change in an organization, orders and guidance must come from the top. Without Management commitment, change will fail.

- Cultural differences
  - Embrace cultural and local differences but be mindful of them.

- Local resource commitment
  - The heroes of the project; the local resources who often need to maintain their daily job while in parallel being part of a project.
  - A clear and repeated message on why a project is done helps to get people onboard and striving towards the same goal.

- Internal resource challenges
  - Ensure general team knowledge of processes and solutions. Never rely on a single expert. Always double up and spread the knowledge.
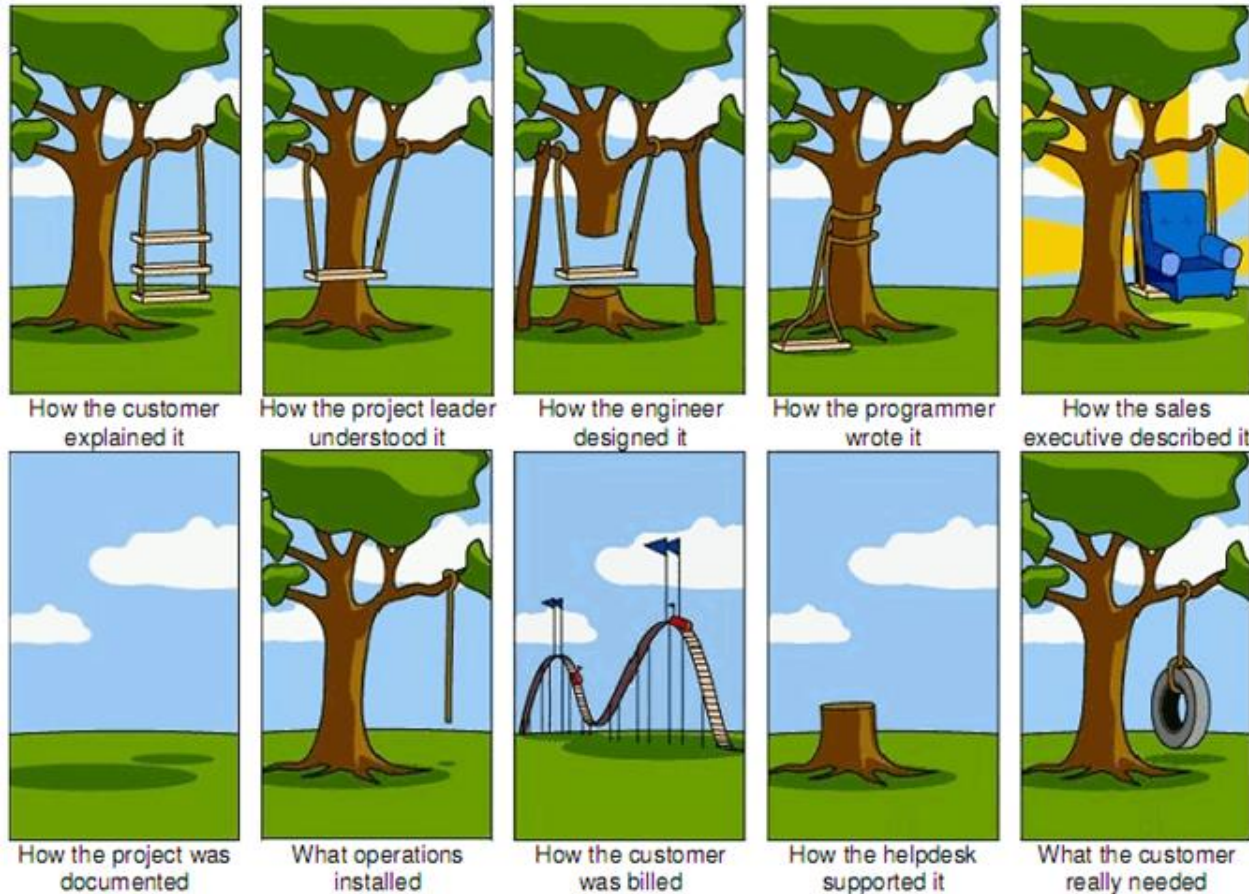
Experience

- Process deviations/changes
  - Make sure that budget margins and timeline allowance exists to handle new processes and deviations to existing/established processes.

- Change Requests
  - If no changes are allowed, then there may be fierce resistance from local site.
  - On the other hand, if a multisite rollout is done across multiple sites with same product lines and you are sure that the process deployed is good enough, then a clear communication that there will be NO changes can avoid spending unnecessary time on change discussions.

- Go straight to process definition in line with Infor processing catalog. Do not dwell on AS-IS.
  - This means, understand the AS-IS, but do not try to recreate it.

- Try to utilise the included systems/software to the max.

- Use a clear and structured project method.
  - As an example Infor Deployment method.

Thank you!

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Source: https://www.codementor.io

Q&A