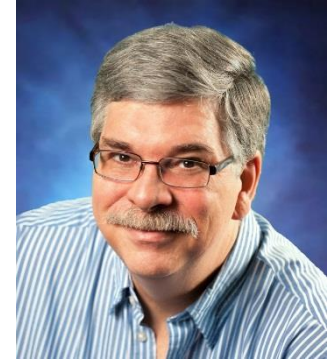


Deep Diving Into JD Edwards Upgrades When The Sharks Are Circling

Presented By:
Michael Guerin, President, TeamCain

HI, I'M MIKE...

- President and Owner of TeamCain
- First touched JDE in 1982
- JDE direct: consultant, senior consultant, client manager, senior client manager, Director of Services for Canada, OneWorld launch Manager for Canada
- Proud and active Quest Ambassador, VAC Member, huge supporter of Quest





AGENDA

Before We Dive In

A Question for You

The Top 10 Upgrade Sharks

Why They Cause Projects to Fail & How to Avoid Them

Project Humor – signs your project is in trouble

What's On the Horizon



BEFORE WE DIVE IN

An ideal project - be it an upgrade, a new module, a full implementation, a go-live - should, in essence, be a non-event

Main upgrade types: **Like for Like** (LFL), **LFL + LHF** (Like for Like + Low Hanging Fruit), **BPR** (Business Process Reengineering)

Business and technology planning is a wheel, not a report

Planning trumps enactment every time

The 3 legged stool of projects: Time, Resources, Investment

Reality should rule

Although the focus here is on JD Edwards upgrade projects, many of these would apply to any technology project



My favorite customer quote ...

“There is no such thing as a technology project ... only business projects with a high reliance on technology.”



SHOW OF HANDS (OR FINS)

What do you think is the biggest obstacle to an upgrade?



Cost



Timing



Customizations



Resourcing



No management buy in/business value

You KNOW they're gonna ask ... so think like them ...

“How will this help us move forward?”

“What will this cost?”

“Will this make us more profitable and tie to our corporate goals?”

“What will we get for the spend?”





UPGRADE SHARK #1: SENIOR MANAGEMENT BUY IN

- Project justification
- Important on larger projects (less on smaller)
- Often have to educate senior staff on projects, on business impact of technology decisions, on “it’s not just C:/install_and_we’re_done”
- Not having this is a huge project issue
 - Senior management *needs* to buy in to the upgrade, support it, and show their support
- You need to rationalize and justify the upgrade to them to allow this buy in to happen (visibility and oversight)
 - Must be ready to show ROI
 - Even if it’s a “it has to be done” project, be prepared to show the benefits as well as the importance of the project to the organization
- Ideal executive sponsor has “paycheck responsibility”



UPGRADE SHARK #1:

SENIOR MANAGEMENT BUY IN (SOLUTION)

- Set up an ERP Governance Model
- Get them involved with project submission and approval
 - Senior staff (i.e., CFO/CTO) should be on the steering committee – tie breaker/level of key decisions
- Really show the benefits of the upgrade (9.1+ new stuff can really help):
 - Reduced maintenance
 - Being more current
 - More efficient staff work
 - Newer tools release features (like UX One, Café One, E1 Pages, Forms Personalization, etc.)
 - Eliminating prior mods
 - Preparing for future benefits (web/mobile applications, new modules, streamlined reporting)
 - Tie technology to the business direction
- Obtain and present best in class comparisons (Gartner, industry groups)
- Remind management of impact of the project on the business, on the P&L, on risk management for statements (CFO of public company is on the hook for this)



UPGRADE SHARK #2:

INTERNAL RESOURCE AVAILABILITY

- Work involved in a project (new module, upgrade) is often underestimated
 - Tasks include test script creation, knowledge document updating, several rounds of testing, new feature enablement, go live prep and end user training
- For each module in JDE you are using, plan for at least 50% FTE, complex set up/BPR upgrade would require more
- Not taking into account vacations, other projects, lottery wins (i.e., Contingency)
- If they say they have no time or have commitment issues at the start = red flag
- It's not just planning the resource, you have to make sure they get the work done!
- Commitment versus involvement
 - 20% involvement is an advisor, not a member (chicken versus pig for your bacon and egg breakfast ... one is committed, one is involved)



UPGRADE SHARK #2:

INTERNAL RESOURCE AVAILABILITY (SOLUTION)

- Management buy in and support is #1
- Must assign enough staff to the project to do a proper job of the set up, review and testing
- Backfill positions with temporary staff
- Consider staffing as an *ongoing* process/need
 - BA's with a foot on the business side and a foot on the technology side
- Consultant fill in can help (this can increase the cost a bit)
- Lengthen the timeline of the project (keep it limited enough; it's a project, not a life mission!)
- Set up proper documentation/scripts/plans from prior projects to help lighten the load (no need to recreate the wheel)



UPGRADE SHARK #3: INTERNAL RESOURCE SKILLS

- The “n00b” aka the new junior accountant for the financial side or the recently trained CNC resource for the technical side... This is a recipe for disaster
- The people you need are the ones you can least afford to pull away from their current task
- Attitude is as or more important as aptitude
- Knowledge of processes is key and openness to different/new ways
- Knowledge of the business itself is very important, particularly if changing business processes
- Testing the future of your business is NOT the place for a rookie or naysayers
- IT are awesome but rarely know the nuances of the business.



UPGRADE SHARK #3:

INTERNAL RESOURCE SKILLS (SOLUTION)

- Find positive people who embrace the changes, keep the spirit of the project up, and who will be team players
- Ongoing identification of the staff who have base skills and attitude that would work
- Use influencers (those who have respect of others in the organization)
- Plan ahead – where should your application technology enablement team be in 2 to 4 years?
- If replacing departing staff, look for JDE experience
- Between projects, send to INFOCUS/COLLABORATE, debrief of what they learned, how it can help organization in the future
- Document, document, document



UPGRADE SHARK #4: SETTING & MANAGING SCOPE

- Beware the Dreaded Scope Creep (duh DUH, duh DUH)
 - Largest project killer once it gets started
 - Scope creep is reflective of the “personality” of the project and senior management direction and control
- What in the world?!
 - New items discovered during the project (requirements review in detail, testing)
- Lurking in the Deep
 - Items not discovered earlier, often related to interfaces and integration
- Problem with user buy in if not managed properly



UPGRADE SHARK #4:

SETTING & MANAGING SCOPE (SOLUTION)

- Define the scope long before the project kicks off and as clearly as possible
- Plan for the upgrade, the type of upgrade it will be, the timeframe and what's included/excluded
- Change control is key
 - Having senior management/senior review/steering committee as your ally will help against pop up requests from users, keep productivity on the up and up, and thwart strong/pushy people
- *If* scope changes (impacting resources, timeline, budget and investment), give final approval to senior management
- Keep in mind, some changes are needed and shouldn't be ignored
- Contingency plans and risk management up front and during the project (Plan B to Z)
- All about Project Management!



UPGRADE SHARK #5: COMMUNICATION

- Lack of communication to team, to management, and to organization
- Surprises can kill a project
 - Senior management doesn't like "Guess what..." meetings
- Cross function teams not communicating results in holes in the project
- Unknown expectations on what team members need to do (time, what's involved, how long, why)
- Confusion for all
 - People being pulled from their jobs for the upgrade
 - Others ask "Why?", grumble, don't understand, don't get filled in
- The larger the project, the bigger the impact

"I didn't know..."

"Was *THAT* in the plan?"

"You need me when?!"

"I'll just ignore it ... maybe nobody will notice."



UPGRADE SHARK #5: COMMUNICATION (SOLUTION)

- At the start identify:
 - Approach and expectations from senior staff
 - Project plans from PMs
- Ongoing for the project team
 - Scheduled status meetings
 - Scheduled steering committee meetings
 - Ad hoc for critical items
- Ongoing for the organization
 - Name the project
 - Monthly/periodic newsletter
 - Executive sponsor email
 - Town hall meetings / intranet updates
- Don't forget communication with the rest of the organization... They may not be directly involved by they are interested!

You (and the rest of the team) shouldn't be afraid to speak up and say:

“We totally missed the website integration needs ...”



UPGRADE SHARK #6:

NON JDE/PERIPHERAL ITEMS

- What interfaces or integrations do you have in place now? How will you carry these forward?
- Are there any related technologies that also need to be upgraded/replaced?
- Hardware dependencies/co-dependencies
- Software dependencies/co-dependencies
- Competing projects
- Disaster Recovery changes
- Output Management (Create!form, Transform), ADC, mobile, payroll interfaces, government uploads)



UPGRADE SHARK #6:

NON JDE/PERIPHERAL ITEMS (SOLUTION)

- Project planning 101
- Set up a system diagram that covers everything and update it
- Anticipate what else is going on in the organization – what is the risk impact and mitigation plan?
- Update disaster recovery plan for changes that are in the upgrade (and perform a trial recovery before you go live)
- What else needs to upgrade in order to upgrade?
 - Browsers, output management etc.
- MTRs for all moving pieces, cross tied?
 - Hardware, software, other products, upcoming changes, timing



UPGRADE SHARK #7: NOT SETTING UP FOR WINS

- Not actively looking at ways to improve the business
- Not taking advantage of the time you've invested now
 - If you're going to invest in a project for the upgrade, why not extend it a little to gain extra wins?
 - Why not take the time to review what can be added without gut wrenching changes?
- Upgrade projects can be long, "project fatigue" sets in and impacts the project
 - A BPR upgrade is a long process if you are realistic
 - LFL + LFL + LFL + LFL = legacy?
- Improper assumptions cause stress and anxiety



UPGRADE SHARK #7:

NOT SETTING UP FOR WINS (SOLUTION)

- What successes are your peers experiencing?
 - Attend conferences, SIGs, local user group meetings
- Break large projects into stages and celebrate them
- “What are your challenges?” sessions with core/key users
- “Where is the business going?” sessions with senior team
- Product and process champions
- Do you track user calls/issues?
 - Source of input for what can be done

Nature evolves so should your ERP



UPGRADE SHARK #8:

NOT PLANNING FOR KNOWLEDGE RETENTION

- Think in terms of “organizational memory”
 - How is yours? More tribal knowledge based
- One of the first items for “cost savings” on project budgets
- How many of the staff on your last upgrade were involved with your prior one?
- How much of your last upgrade will be similar to the one you previously completed?
- Staff turnover
 - Average tenure for millennials = 2 years
- Dependency on certain individuals (Bob just won the lottery, now what?)
- Dependency on implied or trusted knowledge (realistic?)



UPGRADE SHARK #8:

NOT PLANNING FOR KNOWLEDGE RETENTION (SOLUTION)

- Capture knowledge to effectively deal with changes when they happen (i.e. another project, mergers/acquisitions, staff turnover)
- Update internal process documentation, make documentation a diligent part of the project
- Pick a tool (UPK, Word), pick a process, pick the people
 - And maintain it
 - UPK is perfect for this – so learn it, try it, know it, do it! (*Note: support dropping for it*)
- Look at Enterprise 2.0 tools – wikis, blogs, social engagement, knowledge networking
- Test staff and see where applied training will help
- Join a learning SIG or a UPK SIG (check out Quest – they're good people!)
- Axing knowledge retention does not equal cost savings – here are some numbers:
 - 200 users, 15% turnover/year
 - 20% knowledge loss per user, average burdened cost \$50K
 - Loss per year = \$300K (excludes error issues)



UPGRADE SHARK #9: “IT’S NOT A REAL PROJECT”

- Not treating it as a real project
- Viewed as “just a tech thing”
- Custom code, DW versions, reports, enhancements included in the base code, mods that are being retired
- Not preparing for all the changes that come with upgrades
- Assuming that things will work



UPGRADE SHARK #9:

“IT’S NOT A REAL PROJECT” (SOLUTION)

- Realism must rule
- Have a manager, have a plan
- Review what you’re doing with the project and plan accordingly
- Testing, testing, testing
 - Unit testing of functions
 - Integrated testing of the whole system
 - Load testing
 - Disaster Recovery testing and any changes
- Even a pure technical upgrade requires testing and user involvement
 - Any LHF change implies more testing and work
 - Advanced Queries, Café One, OVR, Watchlists, Mobile



UPGRADE SHARK #10: PLANNING FOR THE NEXT STAGE

- Customers (management) often take the easy route with upgrades, just get them done and get current
- Not actively looking to improve
- When project/upgrade ends, everyone breathes a sigh of relief and goes back to business as usual
- Project fatigue and pressure to get on with life comes in
- Not planning for improvements to start in order to get in motion for next project
- Not making business aware of the “art of the possible”



UPGRADE SHARK #10:

PLANNING FOR THE NEXT STAGE (SOLUTION)

- Think of the ERP/Technology Enablement Wheel
 - Just completed a cycle, think in terms of the next rotation starting up
- Debrief meeting at the end
- Talk to management
 - Where is the business going? What from the ERP side can help?
- Ongoing process review and documentation
- Keep the team together (don't let the knowledge/skills/lessons learned fade away)
- Plan for the next stage based on feedback from your upgrade
- Start reviewing options and talking to users about larger functionality and changes that can propel the business forward. 9.x change are a **great** place to start



ADD TO THE LIKELIHOOD OF SUCCESS

DOCUMENT YOUR LESSONS LEARNED

Don't have a "Groundhog Day" project. Take the time to do a project wrap up and honestly review what worked and what didn't.

PLAN ALL YEAR ROUND

You will be better prepared for your next upgrade if you continue your planning all year round, not just before the next upgrade.

SHARE YOUR EXPERIENCE

You never know who might benefit from your story so tell your tale at events and user groups. Your Quest International Users Group account manager is a great resource to discuss this.

NAME THAT PROJECT

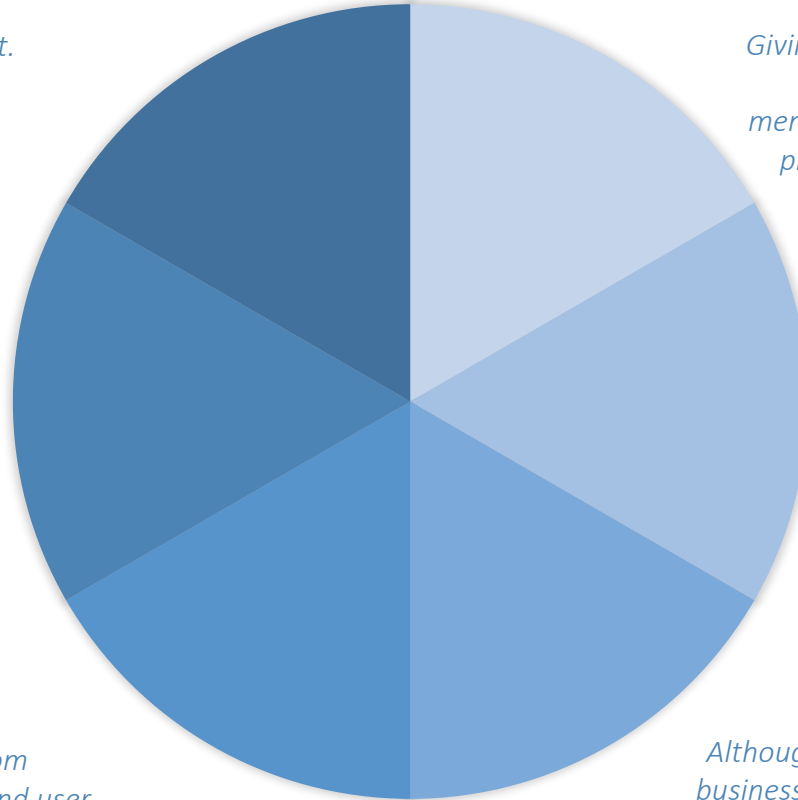
Giving your project a name and doing small things like having gold shirts for team members help to promote ownership of the project and gives a sense of camaraderie amongst the team.

CELEBRATE SUCCESS

A project is a lot of work and can be lengthy so celebrate milestones (i.e. completion of training, completion of first CRP etc.). Also have something special for the team at the end..

KEEP THE TEAM INVOLVED

Although many team members go back into the business after the project, keep them involved as Subject Matter Experts (SMEs) and solicit their input for the next upgrade, any issues that come up, or for ideas on extensions.





Project humor ...

Signs your project is / will be in trouble

- Your Project Manager cannot spell PMP
- Your executive sponsor shows up for steering committee meetings with a bottle of Jack Daniels ... and does not share ...
- Your Distribution team lead just got promoted from store crib lead hand, after 3 years total work experience.
- Your go live date is set in concrete, as is your budget ... and neither make sense.
- Your scope definition is “whatever they need”.
- The technical team is charged with doing the whole project – after all, the business is too busy ...
- Your project sponsor’s nickname is “Pit Bull”
- The executive committee does not have time for “this technical c*(p”
- Management believes you don’t need outside help .. users can just RTFM.
- Your Finance lead is the President of the “Pessimists International” group



WHAT'S ON THE HORIZON

- Pre-Upgrade Assessment
- Fixed Fee, including expenses – we want it to be low risk
- Upgrade and Migration Assessments: 1 – 2 days, on site
 - Full report within two weeks afterwards
 - Covers hardware, software, modules (JDE and non)
 - First pass project plan, investment, resource needs (internal and external)
 - Roadmap for you to chew on
- Numerous products that can lighten the load and “upgrade your upgrade” like DWS, Purge-it!, PACKMAN, Wapman, SCANMAN

“The ERP Roadmap Workshop presented by TeamCain allowed me to clearly visualize organization improvement opportunities in respect to ERP governance.”

“We are delighted with the results of the ERP discoveries provided by TeamCain. They were very easy to work with, extremely responsive, and took the time to understand our needs.”



Coming soon ...

- UX1 / UDO evaluation and recommendations program
 - Selected areas of your choosing (AR, AP, MFG, Payroll, Purchasing, Sales e.g.)
 - Review of new features (Café-one, watch lists, EnterpriseOne page, UX1 roles delivered, forms personalization, OVR, AIS, mobile)
 - Mapping potential to business needs and potential.
 - Recommendations and benefits document.
 - Technical and licencing information / needs
- Fast(er) track to obtaining the benefits



WHO IS TEAMCAIN?



- **Consulting service partner** for JD Edwards customers since 1995
 - ### Upgrades, Migrations, Spot Consulting, Training, Roll-outs
- Partnerships with Best-of-Breed JDE tools:
 - ### **Purge-it!**: JD Edwards (World and EnterpriseOne) archive and purge
 - ### **SCANMAN**: AP Automation Software for EnterpriseOne
 - ### **PACKMAN & Self Service Password Reset**: JDE Object Life Cycle Management, package build automation, self service password reset
 - ### **Dimension SwiftTest**: The easiest way to setup and manage your testing natively within Enterprise One
 - ### **Spreadsheet Server**: Spreadsheet automation, distribution and dashboards for your ERP; Enterprise Budgeting as well
 - ### **RF-SMART** : RF automation with direct integration to JDE (World and E1).



DON'T LET YOUR NEXT JDE UPGRADE PULL YOU UNDER!

Continue the conversation today:

Michael Guerin, *President*
michael_guerin@teamcain.com
800.861.7628 ext 246

www.teamcain.com

