

Customer Implementation Guide

Designed for customers planning to implement Infor solutions, this guide outlines key considerations and prerequisites for establishing a successful, mutually beneficial partnership to achieve your desired business outcomes.

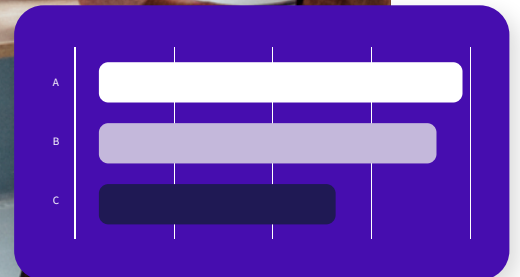


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Welcome

Welcome to the Infor™ Customer Implementation Guide, a collaborative roadmap to create a strong partnership. Infor prioritizes establishing clear expectations to enhance satisfaction and minimize implementation risk. Through open dialogue, we aim to align priorities and responsibilities, defining clear contributions for a successful outcome. Together, we will navigate challenges, celebrate successes, and create lasting value for your business. Your commitment to this framework is key to building a thriving partnership. We look forward to a journey of excellence and accomplishment together.



Intended audience

Designed for customers planning to implement an Infor Industry CloudSuite™, this document outlines key considerations and prerequisites for establishing a successful, mutually beneficial partnership to achieve your desired business outcomes. While the recommendations may be partially applicable or adaptable to other implementation projects, the primary focus is Infor CloudSuite deployments.

The five pillars of success

To ensure your success with Infor's industry cloud solutions, we've outlined five key pillars for customers embarking on software implementation projects with us.

The five pillars of success:

1

Commit to the solution and approach

2

Build an effective team

3

Build clear governance structures

4

Promote change and transformation

5

Prepare your data



The five pillars of success



1. Commit to the solution and approach: Before embarking on the project, ensure that you have thoroughly documented your vision and anticipated benefits. Understand how the proposed solution will drive desired outcomes. Your commitment to embracing the proposed solution and implementation approach is fundamental. By aligning with your chosen path, you pave the way for a smooth journey toward digital transformation.



2. Build an effective team: Success hinges on the people behind the project. Assemble a dedicated team that combines expertise from different disciplines with a combination of strong functional, technical, and behavioral skills. Select natural leaders with an enthusiasm for change. Equip the team with access to project onboarding information, necessary resources, and decision-making authority to ensure efficient and effective delivery.



3. Build clear governance structures: An essential aspect of any project kickoff is confirming your business objectives and implementation priorities, and defining clear roles and responsibilities for all involved. Utilize Infor's methodology to leverage processes that will help you control and guide your project. Infor will also help you review and utilize industry-leading practices to ensure that every team member knows what success entails.



4. Promote change and transformation: Process and cultural adaptation is a critical component of any successful software implementation. The importance of organizational change management cannot be overstated and is often undervalued. Be prepared to lead your organization through this change to facilitate a smooth transition to the new solution.

Invest in comprehensive training and enablement programs to ensure that teams make the most of your new solution. Identify training needs early in the program and plan accordingly to ensure effective training and upskilling efforts, preparing the organization for a successful solution adoption.



5. Prepare your data: The foundation of any software solution is its data infrastructure. It is important to understand your data, its quality, and how it flows through your organization. Establishing data management, optimization, and ownership before starting a project will prevent troubleshooting and roadblocks during system implementation, testing, and launch.

Pillar 1: Commit to the solution and approach

Leverage Infor's industry cloud solutions

Leveraging the advantages of Infor's industry cloud solutions can be a game changer for your organization, enabling you to unlock your full potential while reducing implementation time, incremental costs, and risk.

Following established industry processes will be crucial for your organization. It allows you to benefit from the industry's best practices, improving efficiencies, complying with regulations, and staying competitive. Developed over years of implementation experience, these processes provide a solid foundation for operational excellence, meeting customer expectations, and staying aligned with industry trends.

Before embarking on the project, ensure that you have documented and communicated your vision and anticipated benefits, along with a comprehensive understanding of how the proposed solution will effectively drive and promote those desired outcomes.

To maximize the return on your cloud investment, create a value realization roadmap. Begin by prioritizing core and high-value processes for rapid initial implementation. Start small and scale up gradually, planning subsequent phases to extend usage, to leverage new functionality and advanced system capabilities, such as process intelligence, automation, and artificial intelligence (AI) to leverage the full potential of Infor's industry-specific solution.

Infor's systems offer flexibility for specific business needs. However, there is a tendency for teams to stick to old processes rather than embrace proven standards.

Avoiding unnecessary changes requires effective governance, communication, education, and a culture which embraces continuous improvement.

To ensure a clear focus on industry-standard process adoption, we immediately start reviewing recommended industry-leading processes. Encouraging active engagement from team members in the immediate implementation of these new processes fosters a sense of ownership, thereby ensuring alignment with your business needs.

Most implementations require integrations with the existing application landscape. Considering integrations alongside end-to-end industry processes ensures seamless connectivity and functionality. Utilizing standard integration and Infor OS capabilities streamlines processes, enhances efficiency, and simplifies maintenance. Incorporating these practices optimizes interoperability, collaboration, and maximizes technology investment value.



Infor's standard industry solution comes with a wide range of reports that should cover most essential needs. However, it is prudent to assess if these reports meet your specific requirements and address any potential gaps early on.

Similarly, the standard user roles and security features should align with your organization's needs, but it is still beneficial to review them in light of your compliance and security requirements.

Use best practices for non-standard adoption

Infor's methodology guides the implementation of your unique configurations and development of solution extensions, backed by Infor's Development Factory for quality and efficiency.

Deviating from standard processes and developing complex solution extensions can notably impact project costs and timelines.



As a customer, it's essential to adhere to fundamental guidelines for process effectiveness.

1. Establish a solid business justification before approving any further modifications or development initiatives.
2. Define explicit decision-making authority and determine clear business ownership at each required management level.
3. Provide a thorough description of use cases, data, functional, and non-functional requirements.
4. Ensure that no development begins without an approved functional design and documented use cases.
5. Business owners must conduct testing and formally approve developments in accordance with provided use cases.
6. Embrace our principle of "first time right" and avoid multiple changes of requirements.
7. Plan sufficient capacity and prepare your team.

Follow a proven approach to success

Infor knows that success hinges on a robust foundational plan, established right from the project's start.

During **Onboard**, we focus on strengthening team alignment by ensuring that all stakeholders share a common understanding of business priorities and what defines success. This involves clarifying expectations, fostering mutual accountability, and establishing clear lines of communication. Decision-making and escalation processes are defined to facilitate efficient problem-solving and risk management. To keep the project on track, utilize out-of-the-box system functionality tailored for specific industry needs. This lays the groundwork for minimal maintenance post-go-live when regular cloud updates are applied.



Additionally, we establish governance processes, key performance indicators (KPIs), and controls to monitor and steer progress. At the same time, the project team dedicates attention to preparing the working environment, methodical setup, and tailoring tools/resources for a smooth and productive implementation process.

Teams should ensure they understand project principles, processes, phases, and key tasks. During the project kickoff, training on collaboration tool usage is crucial. Additionally, commitment from your project management team and sponsor throughout the project's duration is essential.

With **Build**, the team will validate the industry-leading processes. Following an introduction by our consulting team, Key Users from your organization will demonstrate the processes to their peers and business owners using sample data provided by you and uploaded into the system during the initial setup. Key Users will document all use cases, and the consulting team will create functional designs that require formal approval to initiate development. Completed deliverables will be tested against approved specifications before final sign-off.

In **Test**, all workstreams will synchronize for end-to-end System Integration Testing (SIT) to validate technical launch readiness. While you assume ownership of the testing process, it is imperative to adhere diligently to the thoroughly defined entry and exit criteria documented in the test strategy. The User Acceptance Test (UAT) ensures that the solution is accepted by the end-user community. For selected End Users, this serves as on-the-job training, enabling them to support peers post-go-live.

Prior to **Launch**, a detailed cut-over plan needs to be put in place, and the go-live readiness must be assessed. Your participation in this detailed checklist-based review is necessary for a successful and seamless transition to the new system environment.

Infor knows that success needs a strong foundation, and this is laid out at the beginning of the project.



All required activities for the project lifecycle are described and governed by our task management system, which will be continuously updated by all team members as work progresses. As a collaborative environment, the system will also replace most email-based communication, keeping all relevant information in one place.

Our joint project management team will actively monitor progress and promptly address deviations from the plan via analysis and decisioning. Following the method and using our collaborative tooling will virtually set you up for success.

Solution readiness

- Functionality
- Processes
- Stability
- Completeness

Technical readiness

- Infrastructure
- Environments
- Integration
- Administration and configuration

Data readiness

- Completeness
- Quality
- Migration and integration
- Data management

People readiness

- Acceptance
- Communication
- Resources
- Organizational change

Transition readiness

- Deployment
- Cut-over
- Training
- Logistics and communication

Operational readiness

- Operational procedures
- Support organization
- Business continuity
- Maintenance and continuous improvement



Pillar 2: Build an effective team

Our collective success relies on each team member clearly understanding their roles, responsibilities, and ability to collaborate effectively.

Project Manager: Appointing an experienced Project Manager is crucial for your project's success. Infor recommends this individual holds relevant certifications (e.g., PMP, CAPM, PRINCE2), be part of your core business, and prioritizes meeting timelines and budgets. Select a Project Manager who has an industry cloud solution prior experience leading enterprise resource planning (ERP) implementation projects and demonstrates strong leadership, communication, and problem-solving skills.

The Project Manager should have decision-making authority and a good understanding of your organization. While they may have knowledge in specific areas, their sole focus should be on managing the project. Depending on the project's complexity, the Project Manager should dedicate at least 50% (and often 100%) of their time to it.



Change Manager: The role of a Change Manager is instrumental in achieving success, focusing on guiding the organizational transformation journey and fully understanding the project's impact.

Implementing an industry cloud solution often involves a transformation project where organizational change is equally significant as changes in the IT landscape.

The Change Manager, reporting to the Project Manager, serves as a key advisor to the Project Sponsor and Executive Steering Committee. This role is responsible for driving change communication, acceptance, adoption, and training for your project. They should understand the organization and its culture, dedicating a significant share of their time to the project.

Not all companies possess the necessary skills and expertise internally, so it is advantageous to explore external support.

Infor recommends this expert has a strong background in organizational psychology and change management methodologies.

Core Team: Select Core Team members who understand how the organization operates and have experience in relevant business processes. Seek adaptable, collaborative individuals who are open to change and have a forward-looking vision.

Identify those highly respected by peers and possessing a profound understanding of your organization to serve as “Change Champions.” These champions may hail from both business/operational (functional) and technical backgrounds.

Key Users: Designate Key Users to coordinate project tasks with respective Business Process Owners and collaborate directly with the Project Manager. These Key Users can be assigned by business (functional) areas, such as Finance, Supply Management, Human Resources and/or by country, region, or geography.

Business Process Owners: These individuals will represent all major functional business departments impacted by the project. Each Business Process Owner will be responsible for overseeing one or more end-to-end processes to be implemented. This responsibility entails accountability for their respective processes and the authority to make decisions. It is recommended to select individuals who can effectively communicate, oversee, and plan the extent of organizational change based on their thorough understanding of business requirements and processes.

Technical Owners: Assigned to specific project areas such as system administration, security, system integration, development, and data migration, Technical Owners collaborate closely with Business Process Owners. They acquire knowledge of Infor tools and techniques to support End Users during implementation and post launch. It is imperative for Technical Owners to participate in relevant training sessions and obtain certifications before starting the project.

End Users: The contribution of End Users to the success of the project cannot be overstated. It is important to communicate process changes and functional role adjustments to them throughout the project duration.

When assembling your team, include enthusiastic end users who can effectively articulate their needs and challenges. They should have a clear understanding of how the ERP system will affect their daily work. During testing, End Users provide valuable feedback, testing, and documentation to the project team. Appointing End Users as “Change Champions” in key areas will further streamline the adoption of changes post-go-live.

These key project team members should anticipate devoting a significant amount of their time on the project. At certain stages, they may even need to commit full-time hours, depending on their project responsibilities. Therefore, it is important to plan and consider backup options for your key contributors to ensure a healthy work-life balance. Some customers try to mobilize the required capacity by assigning more people to the project rather than completely relieving others of their daily duties. Successful projects assign more resources with 100% of their capacity dedicated to the project. Dedicated resources allow for more focus, higher motivation, increased productivity, accuracy, time, and budget efficiency.



Ensure that roles, responsibilities, and expectations for all team members are clearly defined, documented, and understood.

The choice between working on-site, offshore, or remotely in an implementation project depends on various factors. On-site work is beneficial for close collaboration, such as initial setup and training, while offshore consulting and development offers cost-effectiveness and specialized skills. Remote work is versatile, suitable for tasks like data migration and testing. A balanced approach, using all three options as needed, optimizes efficiency and flexibility while meeting project needs. Plan in advance and define the most suitable approach, taking your company’s culture into consideration.

Pillar 3: Build clear governance structures

Project governance is a framework of rules, procedures, and policies that guide project management and oversight. Governance determines how decisions are made and how success is measured. Strong governance is imperative for the success of the project, as it establishes clear roles, responsibilities, objectives, and communication channels from the outset. A governance framework lays the groundwork for accountability, transparency, and proactive decision-making. Through continuous monitoring of progress, early identification of challenges, and necessary adjustments, project governance aids in navigating potential obstacles, ultimately delivering a successful project aligned with your goals and expectations.



Why is project governance important?

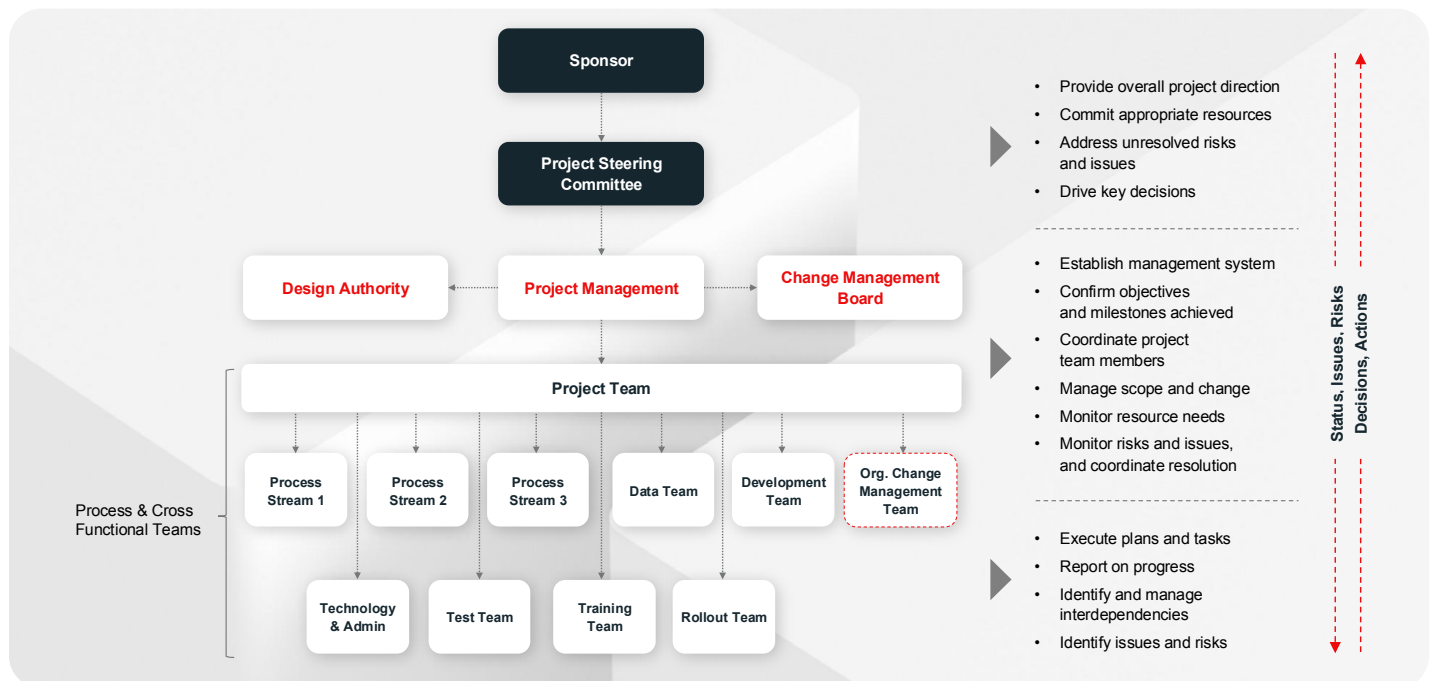
Effective governance relies on the guidance from your leadership; without their direction, it is likely to unravel and lose its coherence. Your commitment to guiding the project team by effectively communicating and holding team members accountable is fundamental to the success of the project. An active project governance not only promotes a culture of collaboration and shared responsibility, but also helps in making informed decisions, managing potential risks, and ensuring that the project aligns with its intended goals. By embracing these practices, your team contributes significantly to the project's success, ultimately achieving the best possible outcomes and mutual benefits.

Infor values your feedback and requests that you give us a monthly performance rating. Your satisfaction is of the utmost importance to us. The Project Sentiment Score, which is included in our joint monthly status reporting, measures your satisfaction with the performance of our project delivery team on a scale from 1 (very poor) to 10 (absolutely delighted). We strive for excellence, and based on your feedback and ratings, we are committed to working collaboratively with you to achieve the highest standards.

A mutually beneficial partnership requires bilateral openness. Based on this principle, Infor will be just as open in giving you feedback. Feedback serves as a platform for meaningful dialogue, fostering a deeper mutual understanding and establishing a solid, balanced partnership. This approach ensures a positive work environment and a relationship built on trust and respect, thereby supporting the success of our collaborative teams.

How to create strong project governance

Project governance includes key processes such as defining project scope, establishing decision-making frameworks, implementing communication structures, monitoring project progress, and ensuring compliance with relevant policies and standards. These processes collectively guide the planning, execution, and oversight of a project to achieve successful outcomes. The governance processes are driven by the project's organizational structure to facilitate efficient decision-making, provide oversight, and enhance the success of project delivery. Certain parts of the project organization play pivotal roles across various facets of project management, contributing to well-structured project planning, execution, and vigilant monitoring. Below is a comprehensive overview of the typical organizational elements within a project governance framework.



Executive Sponsor: An Executive Sponsor, typically a high-level executive like an operational or senior vice president, plays a crucial role in project success. With a deep understanding of the organization's goals, the sponsor dedicates significant time to drive decisions, leads the Steering Committee, and guides the project team. Their commitment ensures alignment with strategic objectives, secures resources and funding, provides strategic guidance, and drives change. The sponsor's leadership helps overcome challenges, improves communication, and fosters accountability, contributing to project success.



Project Steering Committee: Chaired by the Executive Sponsor, the Project Steering Committee defines and enforces project goals, scope, and budget. Comprising senior leaders from Business and IT, including the Infor project sponsor, the committee ensures timely resource availability. The joint project management team reports to the Steering Committee, seeking input on critical decisions. Monthly Steering Committee meetings, and additional sessions as needed, facilitate timely review and support for project issues and risks. The sponsor ensures prioritized scheduling for all participants.



Project Manager: This pivotal role is the linchpin in a technology-driven project, orchestrating activities, managing stakeholders, and ensuring smooth progress from initiation to completion. In ERP transformation, the Project Manager drives alignment with organizational objectives, budget adherence, quality standards, and successful benefit delivery through leadership, strategic planning, and effective communication.



Design Authority Board (DAB): Essential for reviewing potential scope changes and upholding technical integrity, the DAB ensures project design aligns with organizational objectives, mitigates risks, and leads to successful outcomes. Chaired by an enterprise or solution architect, supported by a change management specialist, a security manager, and a Business Process Owner representative, the DAB's expertise contributes to overall project governance, facilitating well-informed decisions and alignment with standards and stakeholder expectations.



Change Management Board (CMB): Vital in large-scale projects or transformations, the CMB focuses on people and social groups affected by role, responsibility, and process changes. Efficiently managing changes, minimizing disruptions, and maximizing positive outcomes, the CMB includes key roles to address human, technical, financial, legal, and operational aspects comprehensively. Diverse expertise within the CMB significantly contributes to the success of change initiatives. The CMB is the center point of the change network that spans all affected business areas.



Workstreams: Larger implementation projects are often organized in different workstreams or subproject teams that focus either on end-to-end processes, particular solution components, or cross-functional tasks. Each workstream has a selected leader, usually a process or technical owner, who coordinates and represents the workstream.

Pillar 4: Promote change and transformation

In the dynamic landscape of modern businesses, the implementation of enterprise software solutions has become a mission-critical initiative for organizations striving to stay competitive and efficient. The success of such implementations is not solely determined by the quality of the software itself or the skills of the implementation team. Success depends on effectively managing the significant changes it brings to the organization. Organizational Change Management (OCM) is pivotal for ensuring a smooth transition and realizing the full potential of the software.



Organizational change management is mission-critical

Many companies underestimate the importance of OCM when embarking on a transformative project like the implementation of new enterprise software. Recognizing that OCM directly addresses the human dimension of change within an organization, it plays a pivotal role in ensuring the success of enterprise software implementation by mitigating resistance, optimizing adoption, and minimizing disruption.

Resistance to change, often driven by uncertainty, fear, or a reluctance to leave the comfort zone, can impede the implementation process. OCM strategies identify, address, and mitigate this resistance, allowing for a smoother transition and preventing disruptions that can hinder project progress.

Furthermore, OCM's focus on creating a culture of receptivity, coupled with training and support, maximizes the adoption and utilization of the software, ensuring that even the most advanced solutions fulfill their potential within the organization. OCM also minimizes disruption by carefully planning and managing the software rollout, preserving the smooth operation of the organization's core functions during implementation.

The strategic implementation of OCM, especially in terms of various communication forms, falls under the responsibility of the company's management. The Executive Sponsor plays a crucial role, tasked with embodying and authentically communicating the strategy and the path of change consistently across different target groups, and activating and engaging leadership peers in this process.

To initiate OCM activities, a strategy for guiding your organization and its members through the change needs to be in place. This strategy should be built on the foundation of a thorough Change Impact Assessment that evaluates how impending changes affect the organization and its people. It is advisable to lay out these plans even before kicking off the project. This allows the team to start the project with a clear plan on how to execute communications and engage employees.

Integrating organizational change management into your project involves a series of essential steps, each of which play an important role in ensuring software implementation success.



Assessment and readiness: Assess the impact of change on the business and evaluate your organization's readiness for change, by examining the current culture, identifying roadblocks, and measuring employee buy-in.



Creating an OCM strategy: Tailor a strategy for facilitating change based on organizational characteristics, encompassing communication, stakeholder engagement, training, and development.



Communication: Develop a comprehensive communication plan, starting with a case for change and key messages. Specify who communicates what to whom, when, and where, while regularly collecting feedback.



Stakeholder engagement: Leadership's active and visible sponsorship is imperative for employee buy-in. Cascade sponsorship, engage employees, and promptly de-escalate conflicts.



Training and development: Implement training programs to equip employees with the necessary skills for effective software use. Provide continuous support and learning resources.



Feedback mechanisms: Establish mechanisms for capturing employee input, concerns, and suggestions, fostering a sense of ownership and allowing for necessary adjustments.



Sustainability: OCM is an ongoing process that extends beyond software go-live. Ensure sustainable change management by reinforcing new behaviors, evaluating outcomes, and making continuous improvements.

The effectiveness of OCM activities in contributing to a successful software implementation relies heavily on their consistent execution from day one. Moreover, the transformation extends beyond the go-live. Sustainable change management involves reinforcing new behaviors, addressing upcoming changes like software updates, and continually training employees for future adaptations.

Training

Training employees on software requires planning and preparation. A one-size-fits-all approach doesn't cater to the diverse learning abilities or preferences of individuals. For a training program to be effective, it needs to fit your company's culture and address each employee individually. Training should be planned and implemented as an ongoing process encompassing pre-implementation awareness, in-depth instruction, and post-implementation support.

At the outset, it's important for the entire Core Team to be aware of the journey ahead, understanding their roles, responsibilities, and the processes governing the implementation project. Therefore, it's mandatory for all team members to attend the same onboarding training.

The Core Team must own the implementation. This ownership is only accomplished when team members learn to work with the new system and processes right from the start. The Infor approach incorporates this principle. Equipped with industry-leading processes and your company's sample data preloaded in the system, your team will be required to validate and present their new processes hands-on. Thus, the team will quickly acquire a deep understanding of processes, data, and their dependencies. This enables them to become ambassadors of the change.

End User Training is an integral component of any successful ERP implementation, as it empowers employees to effectively use the new system, fosters the needed understanding of changes in processes, responsibilities, and workflows, and ensures a smooth transition. Proper preparation for End User Training requires careful planning, resource allocation, and a clear understanding of your organization's unique needs. Infor has developed the following process and provides training managers to implement.



- **End User Training strategy:** Begin with a clear vision of the end goal. Understand user groups, working methods, and learning culture to document the End User Training approach.
- **Curriculum development:** Map roles to processes for each user group to create a curriculum outlining the necessary content for effective training.
- **Content creation:** Leverage digital processes to create training materials efficiently. Utilize technology for tailored e-learning, instructor-led sessions, and point-of-need support in the system.
- **Training logistics planning:** Consider multiple factors for effective training sessions. Organize and prepare logistics to ensure successful training delivery.
- **Trainer preparation:** Prepare trainers not only with content, but also with effective training delivery techniques. Key Users should be equipped to disseminate knowledge throughout the organization.
- **Training evaluation:** Assess the quality of training delivery and individual knowledge levels. Identify and address gaps before the go-live stage.
- **Knowledge sustainability:** Develop ongoing plans for continuous upskilling of employees, ensuring they stay current with changes in processes and technology, and incorporate effective training for new employees.

Continue your journey of success and growth

Early preparation for the post-go-live phase of an implementation is crucial for a smooth transition. Secure knowledge assets through continuous digital documentation to ensure vital information is accessible. Consider Managed Services (CareFor Managed Services) as an option from the project's onset. This proactive approach sets the stage for ongoing system maintenance and assistance, allowing your organization to focus on core competencies.

The initial go-live marks an important first milestone on a journey of continuous improvement and optimization. Your journey started with an initial value realization roadmap. Recognizing that your system's capabilities are constantly evolving and your priorities may shift with changing business requirements, your value realization roadmap needs regular reviews and updates. CareFor Success provides ongoing support and expert consultations to help you navigate these adjustments. Leverage advanced system capabilities and innovations, such as Industry Process Catalog (IPC) driven process monitoring for optimization and value tracking or process automation, streamlining operations. Additionally, harness the power of your data with Infor OS's AI capabilities for better decision-making and increased efficiency. This strategic approach maximizes your system's benefits, guaranteeing it remains aligned with your evolving business goals.



Pillar 5: Prepare your data

The implementation of an enterprise software solution is a substantial undertaking for your organization, but has the potential to streamline operations, enhance efficiencies, and propel your business to new heights. For the success of this transformative project, it is imperative to adequately prepare your data for transformation.



Data management

Before initiating the implementation project, obtaining comprehensive oversight and control over your business data is crucial. Execute the following steps to prepare for the ERP implementation:

Define your data landscape: Document your current system landscape, applications, system of record, data flow, and data owners within your organization.

Ensure you consider the relevance of local, site-specific, group, and global data aspects for your business processes and data management.

Analyze data quality and integrity: Systematically analyze data to understand inconsistencies, incomplete records, redundancies, and outdated information from a technical and a business point of view. Conduct this analysis regularly, especially a few months before ERP implementation to minimize risks and streamline data cleansing.

Familiarize yourself with the ERP data model:

Understand the CloudSuite architecture, data model, and fundamental data flows after the project kickoff meeting. Utilize data migration tools and comprehend data requirements to ensure availability of the needed data for process and data integration based on chosen business processes.

Ensure data quality and accuracy: Assess and create an action plan to improve the quality, accuracy, and consistency of your data. The effectiveness of your ERP system depends on reliable data for trustworthy insights and actions.

Data integration: Understand the structure, formats, and semantics of your data to facilitate seamless integration. Proper documentation of existing integrations accelerates the ERP implementation project.

Data ownership: Clearly define data ownership and responsibilities within your organization to avoid conflicts and ensure data remains a strategic asset. Determine the leading system for hosting and maintaining specific business data.

Define the data lifecycle: Gain a comprehensive understanding of the data lifecycle, ensuring alignment with legal requirements and compliance. This includes identifying data for transfer to the new system, archiving, or deletion to optimize resources and performance. Implement data governance through careful planning, best practices, and engagement of stakeholders across the organization.



Processes and data alignment

Data migration/conversion is a key task in your implementation project. This will require significant contributions from your technical team and your operational leaders who own the data. This workflow begins at project kickoff.

Effective data migration starts with clear goals. Define the specific data to be moved and the reasons for migration. Identify data sources and target systems, creating a comprehensive data map detailing the structure, format, and relationships of your data sources. Finally, assess data quality—a potential resource and time-consuming step that involves addressing inconsistencies, errors, and missing information.

Next, you'll need to prepare for data extraction. This may require the use of extract, transform, and load (ETL) tools, custom script development, or manual export processes.

Before loading data into your new system, a transformation is necessary. This includes data cleansing, formatting, removal of duplicates, correction of data types, and standardization of values. Data mapping and conversion are crucial to defining how data from the source system corresponds to the target system, ensuring compatibility in terms of structure, format, and content (semantics). This is a challenging part of the process, as it requires an intimate understanding of both source and target data structures and semantics. Consequently, several iterations of loading and validation of transformed data may be needed before achieving the required result.

While unit testing is crucial, a full practice run of the migration sequence outlined in the cut-over plan is essential. This practice run helps planning potential downtimes and optimizing runtimes before the actual go-live. Following this run, SIT verifies data interactions with the target system and integrated components through end-to-end process testing. Finally, formal business sign-off validates the migration results before the cut-over and go-live.

During go-live, a documentation of the entire migration process should be created, including steps taken, issues encountered and resolved, and validation results. This serves as internal reference and documentation for future audits.



Summary

Preparing your organization for the upcoming ERP transformation is crucial for its success. Ensuring team members are accountable for following guidelines set by the project governance team and adhering to assigned tasks will keep the project on track and minimize issues along the way.

By following Infor's recommendations and guidelines, you will stay focused on achieving your business goals and utilize tools to set you up for success in the years ahead. By leveraging our industry knowledge and expertise, we will guide you on your project, ensuring industry-leading processes are implemented effectively. We anticipate a successful partnership and look forward to the opportunity to collaborate with you to reach your greatest potential.

Key points to consider



Commit to the approach

Leverage the industry-leading solution

- Before embarking on the project, ensure that you have thoroughly documented your vision and anticipated benefits with a comprehensive understanding of how the proposed solution will effectively drive and promote those desired outcomes. Define and communicate your priorities.
- Use industry processes as defined in the Infor Process Catalog for improved efficiencies, regulatory compliance, and competitiveness.
- Set clear expectations in your organization and with the team.
- Ensure team ownership and alignment with new processes.

Use best practice to avoid non-standard processes wherever possible

- Enforce business justification before authorizing process changes or development work.
- Define clear decision rights and business ownership at management levels.
- Provide thorough descriptions of use cases and requirements.
- Ensure signed-off Functional Design and documented use cases before development.
- Implement a “first time right” principle to avoid multiple changes of requirements.
- Plan sufficient time and capacity.

Follow a proven approach to success

- Define decision-making and escalation processes for efficient problem-solving.
- Set up governance processes, KPIs, and controls for progress monitoring.
- Familiarize the team with project principles, processes, and collaboration tools.
- Dedicate sufficient time and ensure active participation from project management and sponsors during Onboarding.
- Actively participate in training and project team collaboration using the provided tools.
- Validate industry standard processes during the Build phase.
- Conduct end-to-end SIT during the Test phase compliant with agreed Entry and Exit criteria.
- Assess go-live readiness prior to launch based on recommended checklist.
- Use the provided task management system for project lifecycle activities and communication.

Continuous monitoring and improvement

- Regularly update the task management system for progress tracking.
- Replace email-based communication with the collaborative tooling provided by the task management system.
- Actively monitor progress and address deviations through corrective actions.



Build an effective team

Choose an experienced, certified Project Manager with a focus on ERP implementation. Prioritize skills such as leadership, communication, and core business experience.

Assign a Change Manager for organizational transformation who can dedicate sufficient time to the project.

Select Core Team members with knowledge of operations and relevant processes. Look for adaptability, collaboration, and openness to change.

Designate individuals with high peer regard as “Change Champions.”

Free up Core Team members from other responsibilities as much as possible.



Build clear governance structures

Create a governance organization that includes the following members and committees, who are fully vested in the project, its overarching goals, and a commitment to implementing a standardized industry solution.

- Executive Sponsor
- Project Steering Committee
- Project Manager
- Design Authority Board
- Change Management Board
- Workstreams to support end-to-end processes and cross-functional tasks

Enforce compliance with governance processes:

Leadership must hold the team accountable for following agreed project management processes and use tools consistently.

Continuous monitoring and improvement:

- Regularly update the task management system for progress tracking.
- Replace email-based communication with the collaborative tooling provided by the task management system.
- Actively monitor progress and address deviations with decisions for the appropriate response strategy.



Promote change and transformation

Assess change impact early and define a clear OCM strategy

Communicate changes to End Users during the project and include enthusiastic End Users for feedback during testing.

Plan ahead for ongoing changes after go-live by considering managed services to maintain and support your environment, freeing your business to focus on core competencies.

The first go-live is just the beginning of your value realization journey. Prioritize essentials and high-value changes for swift implementation. As business needs evolve, regularly review and update your value realization roadmap. Leverage the continuous stream of innovation and insights from process intelligence. This will help maximize system utilization and ultimately, the return on your investment for the next steps on your journey.





Prepare your data

Ensure data quality and accuracy

- Assess and improve the quality, accuracy, and consistency of your data and begin before the project starts.
- Document the lifecycle of your data and identify what will be required in the new system. Archive or delete data that is not needed for operations or compliance.

Establish data integration protocols

- Document existing integrations to ensure seamless implementation.
- Gain a clear understanding of the structure, formats, and semantics of your data for integration purposes.

Define data ownership and responsibility

- Clearly define data ownership and responsibilities to avoid conflicts.
- Determine the leading systems (system of reference) for hosting and maintaining business data.

Plan for effective data migration/conversion

- Define migration objectives and create a detailed data map.
- Assess data quality, rectify inconsistencies, and prepare for extraction.
- Plan sufficient time and resources for data mapping and testing.
- Conduct thorough testing, validation, and documentation of the migration.
- Plan full rehearsal of the migration sequence and conduct system integration test with migrated data.

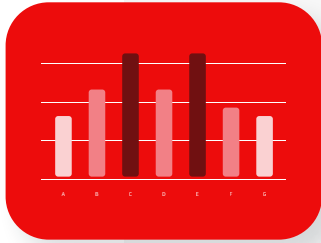


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