

Smart Start Guide
**Beginner's Guide for
Implementing a Manufacturing
ERP Solution**

EPICOR

Certified Platinum Partner



A Note to the Readers

If you're like me, you want to do things right the first time without wasting unnecessary time and resources. You want to stick to the proven strategies of success, with every step getting you closer to your goals. Well, good news for you: You have come to the right place!

You might be part of a growing manufacturing business and looking into ERP software solutions to help your company grow. Or perhaps you are currently using an ERP software that is just not working out.

Whatever your situation might be, this resource is here to help you understand what your business needs next. Is it time to implement an ERP? What can you expect in the implementation process? What can you do to ensure successful results?

This ebook will answer these questions and more. We are here to help you on your journey to making your business the best it can be.

Rob Moyer

President, ComTec Solutions



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1. Should You Implement an ERP System?

In the current world, technology and business are inseparable. Most businesses are implementing technology and software solutions to improve and systematize their processes. One common solution is known as [enterprise resource planning software \(ERP software\)](#), which businesses use to manage all kinds of activities—from supply chain operations to financials—together in one place.

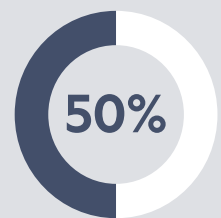
ERP systems are especially useful for manufacturing companies, which are heavily process-oriented and information-heavy. Manufacturers must track products as they make their way from suppliers to customers, track costs and revenue, and manage workers' activities. Here's the rundown of what an ERP system can do for your manufacturing business and how to know when it is time to implement one.

What an ERP System Can Do for Your Business

ERP systems help collect and store data from all departments and business functions, such as the following:

- Finance and accounting
- Job costing
- Customer relationship management (CRM)
- Production management
- Business intelligence
- Warehouse management
- Inventory management
- Supply chain management
- Point-of-sale (POS)
- eCommerce

The ERP system keeps the data organized and easily accessible, making it easier to use for planning, budgeting, decision-making, measuring KPIs, communicating with customers, tracking inventory, and more. All the data is kept in one centralized location, so it is simple to access and use right when you need it.



Nearly
50 percent of companies
are soon acquiring,
upgrading, or
planning to update
ERP systems soon.

How Do You Know If You Need an ERP Solution?

Are you wondering if implementing an ERP system would be beneficial for your business? Here are some signs that it's definitely time:

- ✓ You are unable to make sense of the data in your organization and measure KPIs.
- ✓ Your data is redundant, and you are unable to consolidate it.
- ✓ You have a team member whose job is to collect data and try to make sense of it.
- ✓ Your team members are wasting time on tasks that could be streamlined or automated.
- ✓ Your business is expanding quickly and outgrowing your current processes.
- ✓ Your annual revenue is at least \$5–10 million.
- ✓ Your supply chain team works with vendors across the globe.
- ✓ Your inventory is a mess (e.g., there are missing shipments, you don't know how much inventory you have, etc.).
- ✓ You can't give customers accurate timeline estimates.
- ✓ You don't know what your costs and margins are.
- ✓ Your team can't easily collaborate or share information with each other.
- ✓ You personally spend a lot of time investigating new ways to boost productivity and efficiency.
- ✓ You are having difficulties keeping up with changes in compliance or regulations.
- ✓ You don't have easy data to make informed business decisions.
- ✓ You're working with a lot of different software tools, but none of them are connected to each other.

Do any of these statements sound familiar to you?
If so, there's a good chance it's time for an ERP system.



What Should You Look for in an ERP Solution?

Once you decide to take the step toward implementing an ERP solution, you have to make sure that you choose the right one for your organization. Here are the most **important considerations** of which you should be aware:

- **Agility:** The future is unpredictable. Does the ERP system have a reputation for adapting easily to a changing environment?
- **Innovation:** Does the ERP partner include collaborative tools that will enable employees, customers, and suppliers to innovate together?
- **Professional Services:** Does the ERP implementation partner have advisors with industry expertise that will use best practices to help implement the ERP system smoothly? You want a partner that has “been there, done that” and has a repeatable and successful methodology.
- **Learning Resources:** Does the ERP partner offer learning resources and support so you can quickly become familiar with the system and get answers as needed?
- **Industry Expertise:** Is the ERP partner known for being an expert in your industry? This will ensure it is a good fit for your organization.
- **Scalability:** Is the ERP system set up for future growth? Will it enable you to continually grow?
- **Choice of Deployment Models:** Is the ERP system cloud-based? A cloud ERP system will enable easy sharing as well as secure and efficient data tracking. If you have compliance concerns or are just not ready to adopt the cloud, does the ERP system offer you an on-premises option?
- **Ease of Use:** Implementing an ERP system can be an intensive process. Is the system intuitive and easy to use?
- **Functionality:** Does the ERP system have the capabilities to accomplish what you need it to? Does it align with your business’s goals?



When it comes to manufacturing ERP systems, **Epicor** is a solid choice, as it meets each of these criteria and has a long-standing reputation for quality. Plus, Epicor has deep knowledge of manufacturing specialties, including the following:

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- | | | |
|--------------------------------|--------------------------|--|
| • Aerospace and defense | • Furniture and fixtures | • Make-to-order manufacturing (MTO) |
| • Automotive | • Industrial machinery | • Make-to-stock manufacturing (MTS) |
| • Construction and engineering | • Medical device | • Engineer-to-order manufacturing (ETO) |
| • Discrete manufacturing | • Metal service centers | • Mixed-mode manufacturing (MTO/MTS/ETO) |
| • Electronics and high tech | • Rubber and plastics | |
| • Fabricated metals | | |

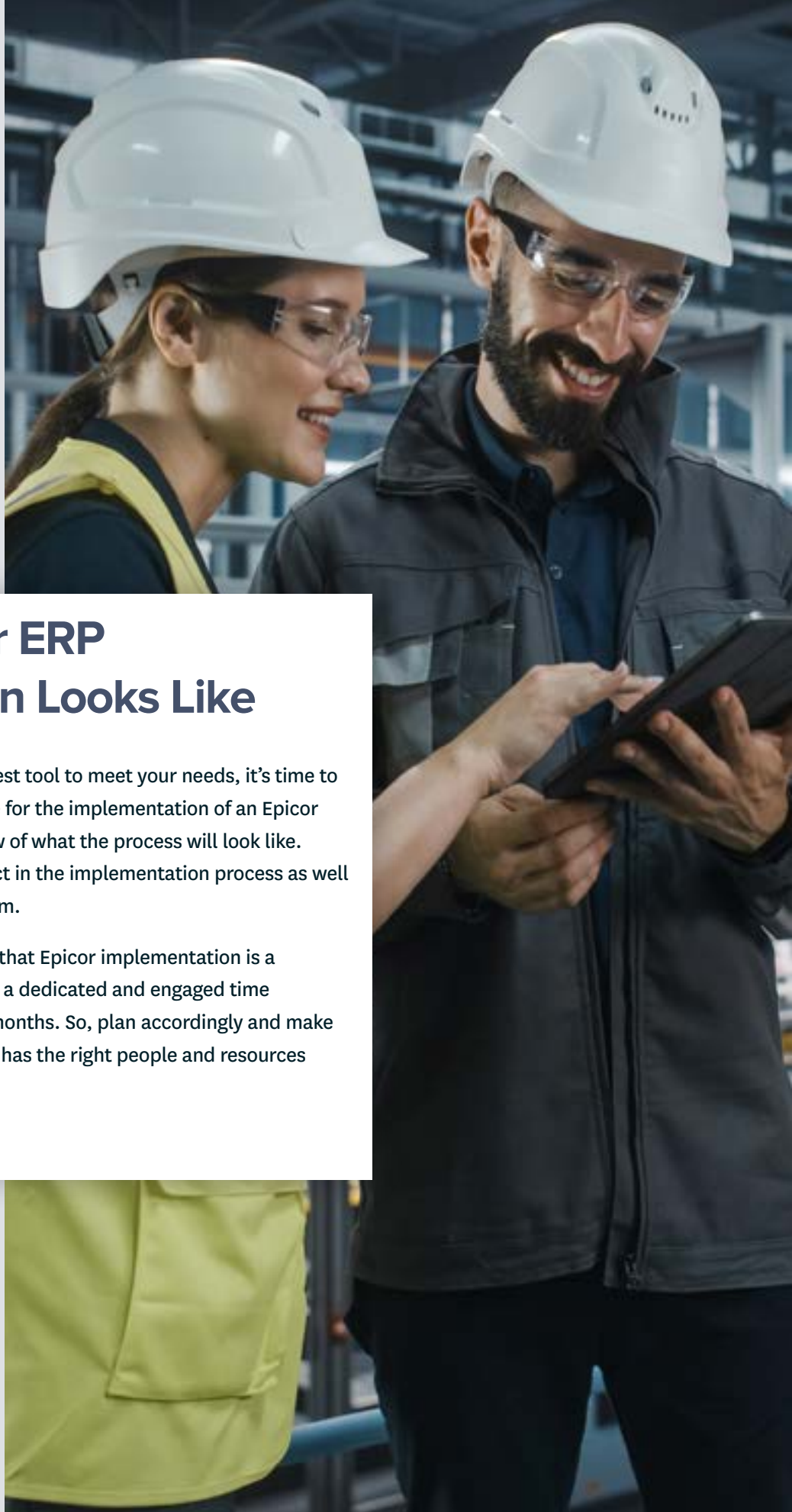
Next, we’ll dive into the specifics of what Epicor Kinetic implementation looks like and how your business can get the most out of it.



Key Takeaways

- An ERP system can gather all of your data in one place, making it easy to access information quickly and manage business activities efficiently.
- You can decide when it is time to implement an ERP system by referring to the checklist of signs that your business needs an ERP.
- Epicor and ComTec are excellent ERP partners when it comes to agility, innovation, professional services, learning resources, industry expertise, scalability, cloud use, ease of use, and functionality.





2. What an Epicor ERP Implementation Looks Like

Once you have identified Epicor as the best tool to meet your needs, it's time to explore the next steps. To better prepare for the implementation of an Epicor ERP solution, it is helpful to get a preview of what the process will look like. Here, we will go over what you can expect in the implementation process as well as common pitfalls and how to avoid them.

First of all, it is important to understand that Epicor implementation is a significant business change and will take a dedicated and engaged time commitment—usually about nine to 12 months. So, plan accordingly and make sure your organization is committed and has the right people and resources ready to get started.

Epicor Implementation Stages

The Epicor implementation process is broken down into **five stages**: **prepare, plan, design, validate, and deploy**.



- 1. Prepare:** Preparation begins with understanding your business needs and what you hope to get out of Epicor. It includes defining the scope, timeline, and budget while, most importantly, making sure the software is a good fit for your organization.
- 2. Plan:** The planning stage is when the implementation process officially starts. The project is initiated with a team in place, and the team defines the strategy and sets priorities. They will define the specific objectives and collaborate with the ComTec team to establish a solid plan to meet your specific business's needs.
- 3. Design:** The design stage entails an in-depth execution of the plan. First, your core project team will be trained on the software functionality and how to understand and use the system. Then, the system is configured according to your business's data so the data can be converted efficiently and effectively. Finally, the data is tested and validated to confirm that it is accurate and useful.
- 4. Validate:** The validation stage helps ensure that the business processes flow as smoothly and efficiently as possible and that the proper documentation is in place. There is thorough testing and analysis of end results to catch any potential gaps or glitches.
- 5. Deploy:** Lastly, your end-user training is completed so team members can utilize and get the most out of the software. Then your company goes live on Epicor Kinetic. It becomes an integral part of your company's daily activities, and business operations are normalized.



Common Pitfalls in ERP Solution Implementations

While implementing an Epicor ERP solution should be a smooth process, there is a tendency to make certain mistakes that limit the usefulness of the new system. Here are some common pitfalls for which to look out:

- **Not fully committing.** Businesses must understand that implementing an ERP solution is a large commitment that will significantly change and improve their company operations. That said, they must be fully on board and willing to invest time and resources into the implementation.
- **Lacking understanding of the business objectives.** An ERP solution won't do much good if you don't have a purpose behind it. Right away, it's important to identify the business goals and objectives. Then, you can determine the best way to use Epicor to fit with those objectives.
- **Not using the right integration partner.** Implementing an ERP solution system is significantly easier when working with an integration partner. Choose an implementer with knowledgeable resources and a proven methodology. [ComTec Solutions](#) is a reputable partner in the manufacturing industry with decades of experience.
- **Not being open to change.** ERP solution software will transform your business; you can't implement Epicor and expect to keep everything the same. Epicor is built using industry best practices. That's why it's crucial to accept and embrace meaningful change. Your organization will be different, but it will definitely be better.
- **Overestimating the bandwidth of your team.** You can't have unrealistic expectations of what your team can handle because you may overwhelm them by asking too much of them at once. A good implementation partner can help set realistic expectations and manage the change. A phased implementation approach is typically the best way to go.
- **Lacking leadership support.** For the best adoption of an ERP solution system, unwavering and consistent support is needed from the top down in the organization. The organization's leadership must treat it as a major initiative. You will need the support and commitment from leadership throughout the entire project in order to have the necessary resources to get it done.
- **Lack of internal communication.** Clear and consistent communication between all levels of the organization is essential to ensure everyone is on the same page. It's important to establish a communication plan that includes regular status updates and progress reports to keep everyone informed and engaged. This will help to avoid confusion, miscommunication, and frustration that can lead to delays and costly mistakes.

⚠ Avoid These Pitfalls ⚠

1. Not fully committing
2. Lacking understanding of the business objectives
3. Not using the right integration partner
4. Not being open to change
5. Overestimating the bandwidth of the team
6. Lacking leadership support
7. Lack of internal communication



Key Takeaways

- Epicor implementation is a significant business change and will take a dedicated and engaged time commitment—usually about nine to 12 months. Plan accordingly and make sure your organization is committed and has the right people and resources ready to get started.
- The Epicor implementation process is broken down into five phases: prepare, plan, design, validate, and deploy.
- Avoid the common pitfalls to ensure you get the most out of the Epicor implementation.



3. Setting Yourself Up for Success

Now that you know what to expect in the Epicor implementation process, here are the expert tips to ensure your Epicor ERP solution is a success for your business: getting the right people involved, working with an implementation partner, and committing to the change.

Getting the Right People Involved

One of the most important aspects of an Epicor solutions implementation is having the right team in place. First, you will need to select an **executive sponsor**: someone from the executive level of your organization who will sponsor and support the implementation project.

Next, you will need to identify your internal **project manager** and **core team**, usually comprising one individual from each of the functional areas of your business. They can be department heads, managers, or hard-working employees who are respected by their colleagues. This team will be crucial in leading their teams in the implementation process, so it is important for them to be fully committed. Further, it's essential that the team has a collaborative dynamic without any one person dominating.

Working with an Implementation Partner

Outside of your organization, you will want to have an **implementation partner**, i.e., a third-party expert who can help advise and configure the Epicor solution to your business needs. The implementor should have a proven methodology for efficient implementation, saving you time and money. Plus, the integration partner can have a long-lasting relationship with your company to keep you up to date on the latest features and offer support and advisory services as needed.



Committing to the Change

HARBEC—a company that manufactures precision 3D-print materials, prototypes, tooling, machined components, and injection molded parts—has implemented Epicor through ComTec’s implementation services, and it has been using it successfully for over 20 years.



Bob Bechtold, *President of HARBEC*

When asked if he could offer one piece of advice, HARBEC president Bob Bechtold stated, “If you’re going to get an ERP [system], you have to be dedicated to it. Choosing an ERP system is a commitment. You need to pick one and stick with it. Lucky for us, we picked a good one in the beginning.”

Implementing an Epicor ERP solution is a major change, so it’s important to be dedicated to seeing it through. If you have strong commitment from your organization and its leaders, you will be in a much better position to use Epicor to its full advantage.



Key Takeaways

- It’s essential to have the right people in place, including an executive sponsor, a project manager, and a core team.
- Work with an implementation partner who can help advise and personalize the Epicor solution to your business needs.
- Implementing an Epicor ERP solution is a major change, so it’s important to be dedicated to seeing it through.



Conclusion

Hopefully, you now have a better idea of how an Epicor ERP system can benefit your business and whether it is right for you. Implementing ERP software can be an intimidating process, but you don't have to do it alone. Epicor implementation partners, like ComTec Solutions, can be a game-changer, providing the expertise to guide you through it all.

Do you still have questions about Epicor ERP system implementation? ComTec Solutions is a full-service IT services company that has been providing advisory and technical expertise for SMBs in industries such as manufacturing and engineering for nearly 30 years. Companies looking to improve productivity, elevate the customer experience, and accelerate financial growth find value in ComTec's expertise in Epicor Kinetic, managed IT services, and cybersecurity. ComTec is a proud Platinum Epicor partner and leading Microsoft partner dedicated to helping customers strategically align technology with their desired business outcomes with speed, agility, and confidence.

To get started on the right path, contact us today!
www.comtecsolutions.com.



Helpful Resources

Epicor Kinetic ERP

- [How To Tell If Your Business Would Benefit From Epicor Kinetic ERP?](#)
- [Implementing and Optimizing Your ERP System](#)
- [ERP + ComTec in These Markets](#)

About ComTec Solutions

[Managed IT Services Tailored to Your Business](#)

