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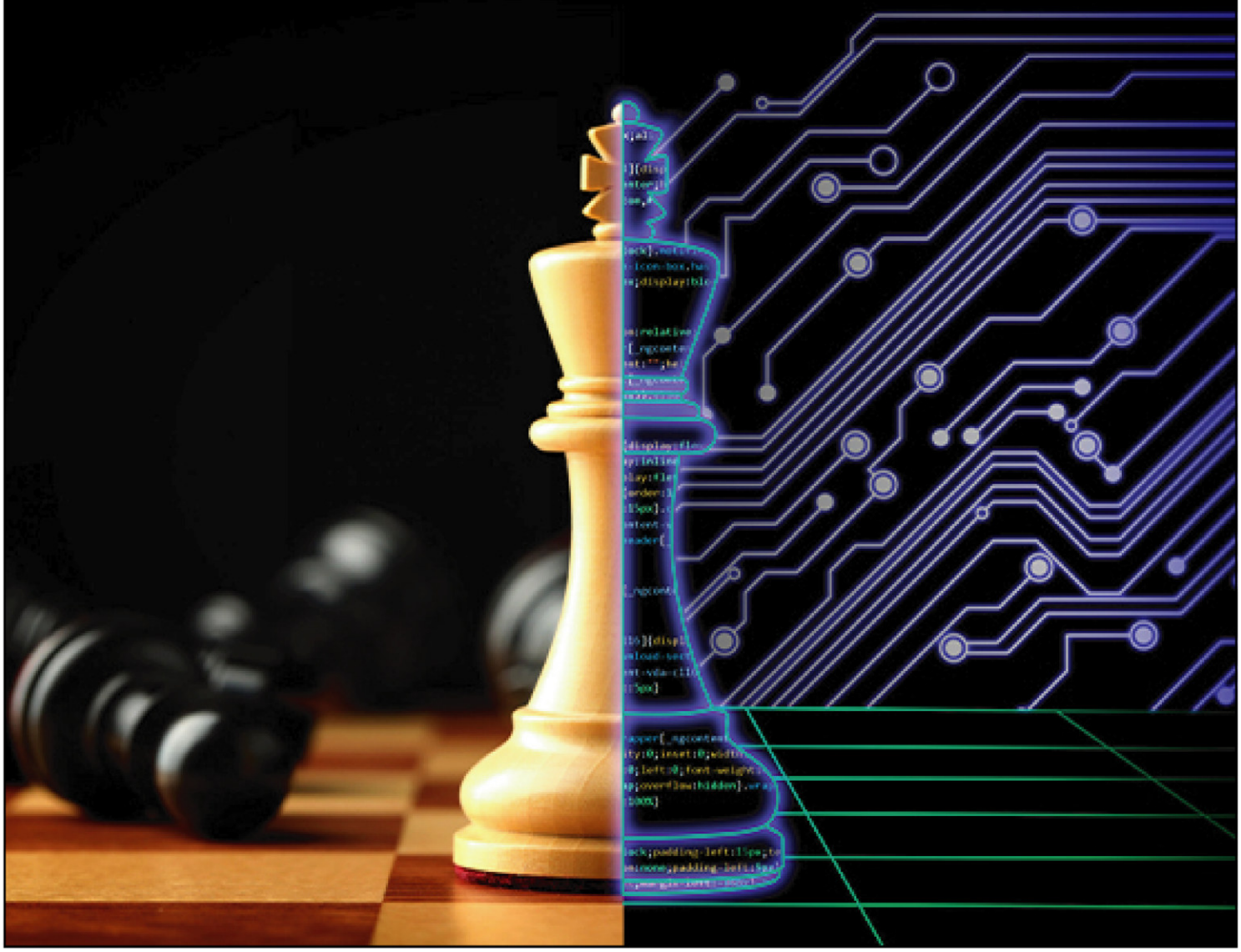
ERP Implementation Strategies

Best practices, key challenges, and actionable tips for successful ERP deployments.



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EDITOR'S NOTE

In the ever-evolving world of enterprise technology, ERP implementation remains one of the most critical — and complex — milestones in any organization's digital journey. A successful ERP deployment can be a game-changer, streamlining operations, enhancing decision-making, and positioning businesses for long-term growth. Yet, the road to success is rarely smooth.

That's why in this May issue of ERPNews Magazine, we delve deep into ERP Implementation Strategies — shedding light on the best practices, common pitfalls, and expert insights that can make the difference between transformation and turmoil.

From the importance of executive alignment and change management to selecting the right system integrator and embracing emerging tools like AI, our contributors offer practical, field-tested advice. We also feature interviews with industry leaders who share real-world implementation experiences and innovative strategies to overcome resistance and ensure adoption.

Whether you're embarking on your first ERP deployment or refining your post-go-live processes, we hope this issue equips you with the knowledge to navigate the journey with greater confidence.

Here's to smarter strategies and smoother implementations.

Warm regards,

Pinar SENGUL, EDITOR

ERPNEWS

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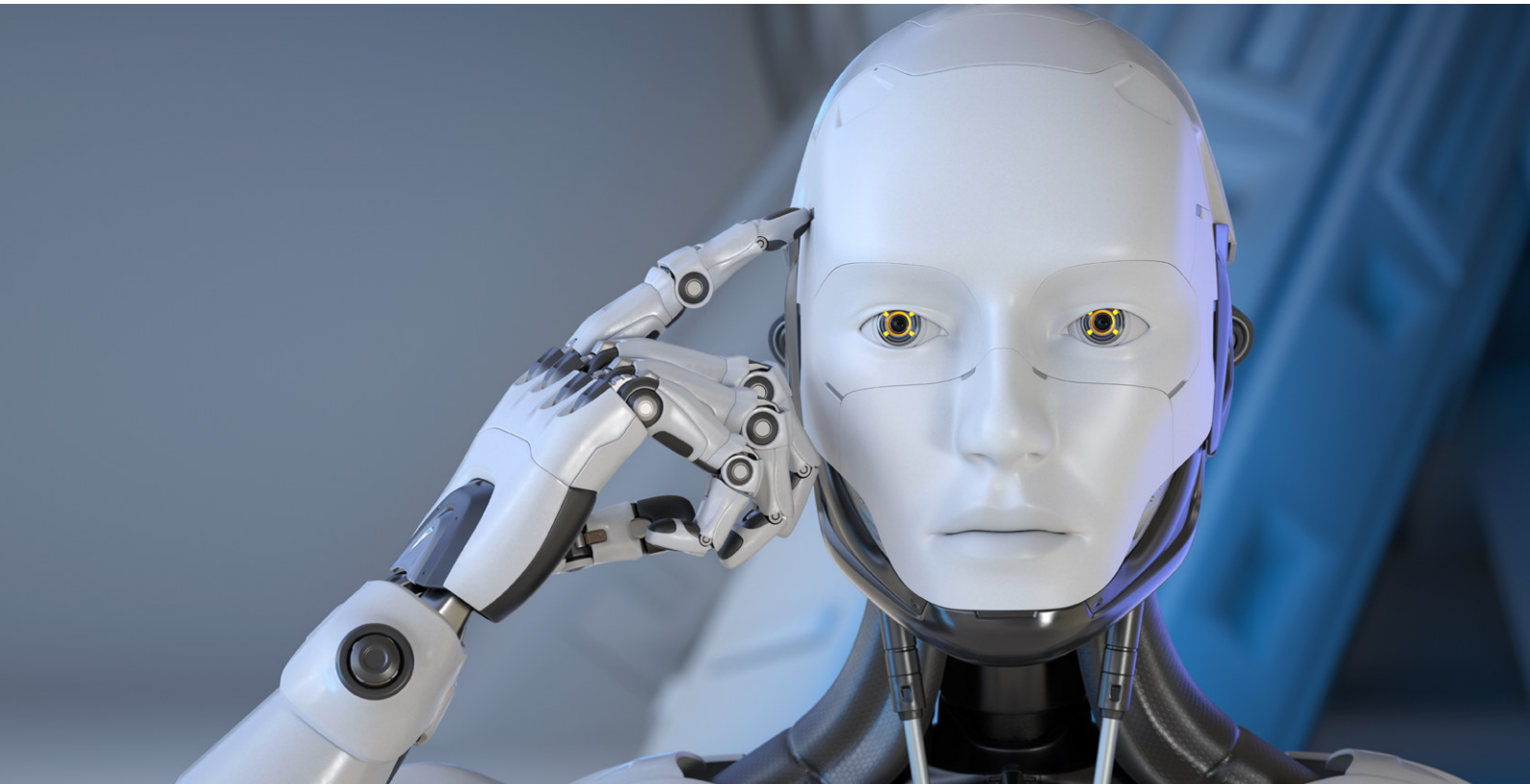

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10 Essentials for Optimizing the Engineer-to-Order (ETO) Lifecycle

Have it your way...right away is the common catchphrase of manufacturers in the ETO space.

This select group of manufacturers is developing new products tailored to their customers' high-level requirements and often without detailed specifications. Unlike make-to-order products, ETO manufacturers must involve the entire design process and collaborate extensively with their customer. But delivering a product that delights the customer, meets deadlines, and maintains profit margins requires seamless coordination and analytical insight throughout the manufacturing process. For manufacturers thinking about entering the ETO space or looking to improve their ETO lifecycle, the first step begins with acknowledging and addressing the most common challenges faced by manufacturers in this industry.

Whitepaper by
Jarrett R. Smith,
Operations Consultant,
Global Shop Solutions

The Challenges

- Getting Your Organization Aligned: How (and where) do you collect and share the trove of customer-supplied design documents including: layouts, design specs, drawings, spreadsheets and more?

- Capturing Costs and Analytics: How do you accurately track multiple cost drivers from engineering, materials, production, labor and services and prevent overruns before they spin out of control?

- Making Real-Time Adjustments: How do you adjust for complex design changes and unforeseen disruptions to make optimal production decisions on-the-fly to ensure on-time delivery of the finished product?

- Communicating with Customers: How do you arm your employees with the information needed to make the customer feel properly engaged throughout the entire ETO lifecycle?

This whitepaper provides 10 essential ways manufacturers can reduce their production times and boost their profitability by addressing the unique challenges of ETO manufacturing.

1. Reduce Response Times to Customer Requests for Quote (RFQs).

When your organization has been selected as a candidate to produce an ETO solution, the data and fact-finding mission is the critical first step. This task includes aggregating a variety of resources, documents, and files including CAD drawings, solid models, phone calls, emails, spreadsheets, or even a paper napkin sketches. Everything needs to be documented and consolidated into one easily accessible location so your design and production teams can quickly and effortlessly create a qualified, competitive quote.

A *Document Control* system with a built-in RFQ workflow can provide an elegant solution for storing and routing your digital files for faster approval to meet tight RFQ deadlines. And once the bid is won, you're now ready to attach digital files to work orders, sales order, inventory lists, purchase orders and more. A fully functional document control system can turn your organization into a lean, paperless manufacturing environment.

2. Quote with Precision and Confidence

For ETO manufacturers, the processes used to calculate price quotes and delivery dates come in an array of techniques, from simple spreadsheets to complex, algorithm-based calculations. Producing a quoted price that is not reflective of your true cost is a risk that can be mitigated by accessing the historical data already captured in your *ERP system.*

The most successful and efficient manufacturers take all the guesswork out of the quoting process by using an automated system for pricing and quoting anything they are manufacturing.

- Existing designs and reference *bills of material* (BOMs) readily pulled from your system should be the foundational pieces of information needed for creating an ETO quote.

- Real-time raw material costs found in the inventory master should be factored into the quote.

- Your suppliers can further validate costs. Supplier communications through an integrated *Customer Relationship Management* (CRM) system helps keep the multitude of emails in one place and tied to your project.

- Pushing these inventory costs into to a *router*/estimate will combine the latest costs into a new quote without waiting for a new price sheet to be updated.

- And finally, your *Estimators* should also access historical job performance on past products and make adjustments to avoid potential cost overruns.

> "Have it your way… right away is the common catchphrase of manufacturers in the ETO space."

Now that your quote is complete and approved, you can send it with high confidence knowing your estimates are precise. History doesn't always repeat but it often rhymes, which favors ETO manufacturers who can harvest past data to inform their future quotes.

3. Be Ready for Kickoff Before the Order is Won

Sales has converted the quote and acknowledged the successful "winning" of the order. When the purchase order (PO) has finally arrived, the stage is set for a series of kickoff activities for your company. Are you ready?

When that PO hits your system, all known requirements should already be accessible and transparent in your system. The ERP system's sales order acknowledgment should automatically put into motion a series of baseline activities in preparation for the formal kickoff including creation of the new product design part numbers, description, terms and conditions, as well as pricing and due dates. This is also an opportunity to share this information with your customer and internal stakeholders to create clarity and alignment on the build expectations.

4. Create a Home Base for Project Kickoff

Henry Ford is credited with proclaiming that "If everyone is moving forward together, then success takes care of itself." The Project Kickoff is the point where everyone starts moving forward together. For the ETO manufacturer, the Project Kickoff converts customer design specifications into a production prescription.

An ERP system should be a home base for a Project Kickoff. The ERP should generate a new project number that will serve as the umbrella for collecting and disseminating the order lifecycle components. In a Project Kickoff, a cross-functional team reviews all the aggregated data and translates this into project risks, opportunities, timelines, and priorities. Parallel work streams should be developed, engineering and design work orders should be started, and lead times for purchased items should be examined.

> "Set your design and production teams up so they can quickly and effortlessly create qualified, competitive quotes."

A project consists of a work breakdown structure, translating production steps into phases and groups that collect costs/revenue and provide budgetary estimates for timelines and schedules. Defining the boundaries during project kickoff combines the resources to successfully launch a new ETO project into a formal engineering/ design review.

5. Measure Twice and Cut Once: Convert Concepts into a Design for Manufacturability (DFM)

Engineers and designers provide the technical blueprint for a successful ETO campaign. Finalizing the BOM and production router precedes production scheduling and material resource planning. Is it simply a stamp of approval to begin production? Of course not!

During the engineering and design phase, you can expect to produce production support elements including but not limited to:

1. Electrical and mechanical schematic drawings
2. 3D solid model and 2D dimensional CAD drawings
3. Raw material, component part, consumable part numbers
4. Labor and outside service workflows
5. Special design notes and callouts

Your ERP system should translate engineering design into a DFM – a plan for making a better product at a lower cost. A robust design review allows the shop floor to create an achievable production plan to build a high-quality finished product.

ETO manufacturers are often faced with concurrent engineering demands that require new drawings and specifications to be developed in parallel with production. A modular design and release protocol for assembled elements can sequence the engineering design into a successful production solution.

At the conclusion of the engineering and design review, a digital sign-off should be available in your ERP system. Production and supply chain planners can now take the stamp of approval and begin production on fulfilling order requirements for project release.

6. Automate Your Raw Materials Management and Inventory

The flood gate of new material requirements leads to a scramble for vendor quotes, POs, and forklifts to offload a daily stream of raw goods. Visibility of material order fulfillment to coordinate and automate processes is essential.

The most successful manufacturers rely on automated purchasing, so they know when to buy parts and in what quantity. An ERP system should provide real-time statuses of purchased raw materials and *inventory management.* Delays and scheduling changes should be regularly reviewed and updated for production. Inventory and warehouse teams should allocate raw materials to a project in a timely manner. As material costs are added to the project, tracking of project completion can be managed and reviewed.

This orchestra of material management is dynamic. Planners and buyers need their ERP system to track status in a realtime dashboard format. The intersection of materials and schedules can cause a traffic jam of information, particularly when dependencies are at stake. As inventory requirements are fulfilled, production planners can queue the release of jobs into production for manufacturing to begin.

7. Create a Master Production Schedule That Can Adjust on the Fly

The production job release is the trigger that tells everyone you're ready to produce. The production team now needs two things: a ready-to-go *Master Production Schedule* and a software system that empowers them to make adjustments when the inevitable change request occurs.

For some companies, kicking off production means more production meetings, coordinating people's schedules, reviewing existing production schedules, and so on. The chances of miscommunication or missing information increase without lockstep coordination. One of the key elements for getting your team off to a smooth start is a simple data entry system that alerts everyone involved that the Master Production Schedule is now available/accessible and it's time to get to work.

An ERP system should leverage the Master Production Schedule to layout production sequencing to create a part in the least amount of time. Everyone should know which jobs/workorders are in progress and which ones are still queued for release. Furthermore, the Master Production Schedule should be flexible enough to handle what-if scenarios. Customer demands can change, even daily, and schedules are never written in stone. Your ERP system should be able to handle these emergencies to maintain a steady level of operation and provide a way to evaluate the impact of this reschedule on tools, materials, and labor. By having such capability in place, you can maximize the efficiency of your operation in the event of sudden changes.

> "An ERP system should provide real-time statuses of purchased raw materials and inventory management."

8. Set Up Real-Time Monitoring to Stay On-Track

Understanding the true cost of goods sold (COGS) for your ETO product can be a daunting task given all the cost components that go into that number. Furthermore, disruptions that impact material and labor costs can quickly erode profit margins with limited visibility into the true cost drivers.

Real-time cost monitoring gives you the ability to measure your job profitability during production or when production has been completed. It should also let you compare your estimated dollars/hours vs actual dollars/hours for all labor and material costs. Realtime cost monitoring aided by touch screen *Shop Floor Data Collection* stations and barcoded work orders helps your team become more responsive when action is needed and prevents unwelcome surprises post production.

As your ERP system reviews actual status of jobs, managers and operators can respond to a steady stream of feedback that keeps progress on track against your *KPIs*. Your ERP system should plant red flags when current work in progress is deviating from planned labor and material allocations and highlight what needs to be improved. Priorities change and reschedules are inevitable.

How do you respond? With confidence, enabling skilled teams supported with data analytics to uncover the potential unknown risks that exist during ETO production.

As more value is added in the form of labor, outside/contract services, and overhead, your projects can be refreshed. A reliable accounting of the budget estimated costs and actual costs can be calculated to

ensure project objectives are met and corrective actions are taken when necessary. Routines are maintained and refreshed all the way to the finish line.

Real-time cost and progress monitoring on dynamic dashboards from your ERP system gives your production team maximum visibility into profitability and lets your project managers sleep better at night.

> "End of the month and year-end anxiety should be eliminated knowing your ERP system is tracking costs and revenue."

9. Know Your Final Costs Before You Ship

A line of transportation trucks is backing up to the dock and ready for delivery to customer destinations. Load it up and ship, ship, ship! Right? Not so fast! ETO manufacturers need to be prepared to consolidate the work, prepare cost reviews, and book inventory valuations for future data analysis and profit review. You are in business to make profits. Therefore, it is important to review your production costs prior to shipping.

Forward thinking ETO manufacturers are booking COGS to inventory throughout the lifecycle and need a last-minute review and signoff to ensure that costs were not left out. Did you receive all POs? Did you issue the materials to completion? Has labor been reconciled for the last day of activity? With an affirmative and decisive review, your ETO products can stage while the administrative cost review team signs off on the completed job.

The shipping dock readies the packaging, labels, and begins to schedule pick-up from third party logistics or in-house transportation. Your ERP system should show the readiness of all inventories prior to shipment. A robust *Dashboard* of all open sales orders with an accounting of on-hand quantity permits shipping to proceed with final preparations to deliver on-time and on-budget.

10. Evaluate Your Performance

Now that costs are finalized and the order has been invoiced, a diligent review of your KPIs can begin. Did we estimate accurately? Did we execute the plan with the precision required? The good news is the answer should be known before it was asked. Your ERP system reviews costs and revenues throughout the ETO lifecycle.

Analyzing specific costs or weighted average cost is recommended for your ETO project to deliver an accurate assessment of job performance. Billing cycles and invoice visibility should be readily accessible no matter the method agreed upon through the terms and conditions with your customer.

Book the cost and reap the rewards of a job well done! End of the month and year-end anxiety should be eliminated knowing your ERP system is tracking costs and revenue with real-time scorecards. You may not win them all, but your ETO project now serves as proof-of-concept for future orders and provides the confidence that your team is ready to quote your next project.

About Jarrett R. Smith

Jarrett Smith is a strategic leader in project management and operations for the Global Shop Solutions New Implementations Team. With two decades of experience as a manufacturing engineer with ERP, he focuses on manufacturing process improvements, integrating best practices, and promoting production efficiency.

About Global Shop Solutions

Global Shop Solutions ERP software provides the applications needed to deliver a quality part on time every time from quote to cash and everything in between including shop management, scheduling, inventory, accounting, quality control, CRM and 25 more. Available in the cloud or on premise, our manufacturing customers benefit from real-time inventory accuracy, improved on-time delivery, lower administrative costs, increased sales and improved customer service. Headquarters in The Woodlands, Texas includes a state-of-the-art R&D facility and Global Shop Solutions training center. Through its offices in the U.S., Mexico, Indonesia, Singapore, Australia, New Zealand and the United Kingdom, the company supports thousands of manufacturing facilities in over 25 countries and more than 30 industries. For more information please visit globalshopsolutions.com.

9 ERP Implementation Strategies

The strategic integration of Enterprise Resource Planning (ERP) systems transcends a mere technological upgrade; it represents a vital step toward comprehensive business transformation. Achieving success in ERP implementation hinges not only on the selection of the right technology but also on mastering the art of seamless integration and adoption across an organization, underscored by choosing appropriate ERP implementation strategies.

Deploying an ERP system can significantly enhance a company's operations, with reports indicating improvements in operational efficiency by up to 95%. Moreover, such implementations can lead to a reduction in operating and administrative expenses by over 20%. However, the path to success is challenging. According to G2, approximately *50% of ERP installations fail* on their first attempt, and 64% of ERP projects exceed their budget. Further, 30% of these installations take longer than expected, potentially leading to substantial financial losses and operational disruptions.

The global ERP software industry is poised for rapid growth, estimated to reach *$78.4 billion by 2026*, with a market value of $49.5 billion projected by 2025.

Article by Apty

Digital Adoption Platforms (DAPs) have emerged as game-changers in this domain. By enhancing user experience and adoption rates through contextual, in-app, personalized guidance, DAPs critically influence the success of ERP implementations. They effectively tackle one of the primary challenges in ERP projects: the complexity of user adoption. Notably, *78% of companies with successful ERP implementations* attribute their success to effective change management and comprehensive employee training programs, reflecting a substantial positive impact on organizational efficiency post-ERP system implementation. The role of DAPs in simplifying and streamlining this process is indispensable.

With this foundational understanding, let's delve into the strategies that can be employed to implement an ERP system successfully in your organization.

> "Stakeholder engagement and communication are pivotal in ERP implementation."

ERP Implementation Stages

Implementing an *ERP system involves six main stages* that are usually carried out over several months or even years. This process should start before you finalize your decision on which product to purchase, and it should continue even after the initial deployment of your chosen system.

These stages are crucial in ensuring a successful ERP rollout, and understanding each phase is vital for any organization embarking on this journey.

1. Project Planning and Preparation

- ***Objective Setting:*** The process begins with defining clear objectives and scope for the ERP implementation. This includes understanding the business processes that the ERP will impact and setting measurable goals.
- ***Resource Allocation:*** Assigning a dedicated team for the project, including internal stakeholders and external consultants, is crucial. This team will drive the project from inception to completion.
- **Timeline Establishment:** Develop a realistic timeline for the project, factoring in all stages of implementation.

2. Requirements Analysis and ERP Selection

- ***Needs Assessment:*** Conduct a thorough analysis of business needs, involving inputs from various departments to ensure the ERP solution aligns with organizational goals.
- ***Vendor Selection:*** Evaluate ERP vendors based on the organization's requirements, budget, and compatibility with existing systems.
- ***Software Customization Needs:*** Identify any specific customizations or integrations needed in the ERP software to meet unique business processes.

3. Design and Development

- ***System Design:*** Develop a blueprint for configuring and customizing the ERP system.
- ***Data Preparation:*** Prepare the data for migration, including cleaning, mapping, and validation.
- ***Customization and Integration:*** Begin customizing the ERP software and integrating it with other systems as necessary.

4. Testing and Training

- ***System Testing:*** Rigorously test the ERP system to ensure it functions as expected. This includes unit testing, system testing, and user acceptance testing.
- ***Training Programs:*** Develop and implement comprehensive training programs for users tailored to different roles within the organization.
- ***Feedback Incorporation:*** Use feedback from the testing phase to make necessary adjustments.

5. Deployment and Go-Live

- ***Implementation Strategy:*** Decide on a deployment strategy, whether a big-bang approach or a phased rollout.
- ***Go-Live Support:*** Provide extensive support to users during the initial go-live period to address any immediate challenges.
- ***Performance Monitoring:*** Monitor the system's performance closely post-go-live to ensure stability and efficiency.
-

6. Post-Implementation Review and Support

- ***Evaluation:*** Conduct a post-implementation review to assess the project's success against initial objectives.
- ***Continuous Improvement:*** Implement a plan for ongoing improvements and updates to the ERP system.

- ***Long-term Support Structure:*** Establish a long-term support structure for users to ensure the ERP system continues to meet the organization's evolving needs.

> "Customization vs. standardization is a critical decision point in ERP implementation."

ERP Implementation Strategies

After laying out the critical stages of ERP implementation, it's essential to focus on strategies to make the process more efficient and effective. The following strategies are instrumental in navigating the complexities of ERP implementation and ensuring its success.

1. Stakeholder Engagement and Communication

- ***Early Involvement:*** Involve key stakeholders from the outset to ensure alignment with business goals and to address any resistance to change.
- ***Regular Communication:*** Maintain clear and continuous communication throughout the project lifecycle to keep all parties informed and engaged.

2. Customization vs. Standardization

- ***Balance Customization:*** While customization can align the ERP system with business processes, over-customization can increase costs and complexity.
- ***Leverage Standardization:*** Standardize processes wherever possible to fully utilize the ERP system's native functionalities.

3. Data Management

- ***Data Clean-Up:*** Prioritize cleaning and organizing data before migration to avoid data integrity issues.
- ***Data Migration Strategy:*** Develop a comprehensive data migration strategy that includes mapping, testing, and validation.

4. Change Management

- ***Change Management Plan:*** Develop a robust change management plan to address the human aspect of ERP implementation, including training, support, and managing resistance.
- ***Organizational Readiness:*** Assess and prepare the organization for change to minimize disruption and ensure a smoother transition.

5. Effective Project Management

- ***Strong Leadership:*** Ensure strong project leadership and governance to steer the project in the right direction and make timely decisions.
- ***Project Monitoring:*** Implement rigorous project monitoring and control mechanisms to keep the project on track and within budget.

6. User Training and Support

- ***Comprehensive Training:*** Offer comprehensive training programs tailored to different user groups' needs.
- ***Ongoing Support:*** Provide continuous support post-implementation, including helpdesks, user manuals, and online resources.

7. Testing and Quality Assurance

- ***Thorough Testing:*** Conduct thorough testing at various stages of the implementation, including unit testing, system integration testing, and user acceptance testing.
- ***Feedback Loop:*** Create a feedback loop to continuously improve the system based on user input and testing results.

8. Phased Rollout

- ***Pilot Testing:*** Consider starting with a pilot implementation to test the system in a controlled environment.
- ***Phased Approach:*** Implement the system in phases to manage risks and learn from each phase before full-scale implementation.

9. Post-Implementation Review

- Performance Metrics: Establish clear performance metrics to evaluate the success of the ERP implementation.
- Lessons Learned: Conduct a post-implementation review to gather lessons learned and apply them to future projects or system enhancements.

These strategies offer a comprehensive approach to ERP implementation, addressing the technical, organizational, and human factors contributing to such projects' success or failure. By adhering to these strategies, organizations can significantly increase their chances of a successful ERP implementation.

Article by Apty

> "Effective data management ensures the integrity and reliability of ERP systems."

Here are some noteworthy mentions of well-known ERP implementation strategies:

- ***Big Bang:*** This approach involves a single, major cutover to the new ERP system, where all users move to the new system on a specific go-live date. It's like flipping a switch; the organization switches from the old system to the new one simultaneously. While this method can be faster and less expensive, it also carries higher risk due to the sudden change.
- ***Phased Rollout:*** In this approach, the implementation is done in stages or phases. This could be by module, business unit, location, or other logical segments. The phased rollout helps manage the complexity and risk by breaking the implementation into more manageable parts, allowing lessons learned in earlier phases to inform later ones.
- ***Parallel Adoption:*** This strategy involves running the new ERP system concurrently with the old one for a period. Users operate both systems simultaneously until the organization is confident that the new system functions correctly. This approach reduces risk but can be resource intensive as it requires maintaining two systems simultaneously.
- ***Hybrid:*** A hybrid approach combines elements of the other methodologies. For instance, an organization might use a phased approach in some areas of its operations and a big-bang approach in others. This allows for flexibility and customization of the implementation strategy to fit the specific needs and risks of different parts of the organization.

The selection of an ERP implementation methodology depends on various factors, including the organization's size, the complexity of the business processes, resource availability, risk tolerance, and the criticality of the ERP system to daily operations. Each method has pros and cons, and the choice often involves a trade-off between risk, cost, and disruption to the business.

> "Change management is essential to facilitate user adoption and minimize resistance."

How DAPs Facilitate Seamless User Adoption of ERPs

Integrating Digital Adoption Platforms (DAPs) into ERP implementation strategies marks a pivotal shift in how enterprises approach user adoption. DAPs streamline and simplify the user experience, addressing one of the most significant hurdles in ERP projects: the steep learning curve associated with new systems.

A. Bridging the User Adoption Gap

DAPs serve as a bridge between complex ERP functionalities and user capabilities. They provide real-time, contextual guidance within the application, making it easier for users to understand and navigate the ERP system. This in-app assistance is tailored to the user's role and tasks, ensuring relevance and efficiency.

B. Enhancing User Engagement and Competency

DAPs are designed to enhance user engagement through interactive walkthroughs, tooltips, and task lists that guide users step-by-step through processes. This hands-on approach accelerates the learning process, leading to quicker and more effective user competency in utilizing the ERP system.

C. Customized Learning Experiences

DAPs offer the flexibility to create customized learning experiences that match the specific needs of different user groups within an organization. This personalization is crucial in catering to the diverse roles and responsibilities that interact with the ERP system, ensuring that each user receives relevant and efficient training.

D. Reducing Resistance to Change

Change resistance is a common challenge in ERP implementations. DAPs mitigate this by providing a supportive and intuitive learning environment. This approach eases users' transition, reduces anxiety and resistance, and fosters a more positive attitude towards the new system.

E. Analytics and Feedback for Continuous Improvement

DAPs come equipped with analytics capabilities, allowing organizations to track user performance and identify areas where users struggle. This feedback is invaluable for continuously improving the ERP system and the training materials, ensuring that the system evolves in line with user needs and preferences.

F. Aligning with Organizational Goals

Effective DAP implementation aligns closely with organizational goals and objectives. By improving user adoption rates, organizations can maximize the ROI of their ERP investment, ensuring that the system contributes significantly to operational efficiency and business growth.

apty

Use Case	KPIs Measured	Challenges	ROI Impact	Apty Feature
Financial Management	Cash Flow, Profit Margin, Debt Ratio, Days Sales Outstanding	Financial errors, Late payments, Compliance issues	Improved Financial Health	Real-time Dashboards, Automation
Inventory Management	Inventory Turnover Rate, Stockouts, Order Accuracy, Lead Time	Data inaccuracies, Overstock/Understock, Inefficiency	Cost Savings, Reduced Stockouts	In-App Guidance, Task Lists
Human Resources	Time to Hire, Employee Satisfaction, Turnover Rate, Training Completion	Talent retention issues, Compliance violations, Poor Onboarding	Enhanced Productivity, Talent Retention	Interactive Walkthroughs, Analytics
Sales and CRM	Conversion Rate, Sales Growth, Customer Lifetime Value, Sales Cycle Length	Missed opportunities, Data silos, Inefficient Sales Process	Revenue Growth, Improved Customer Relations	User Segmentation, Notifications
Manufacturing	OEE, Defect Rate, On-time Delivery, Downtime	Production delays, Quality issues, Resource underutilization	Increased Efficiency, Reduced Downtime	Workflow Builder

7 Best Practices for ERP Implementation in 2025

Implementing ERP software in 2025 is no longer just adopting a technology, it's about transforming business operations to align with a rapidly evolving business landscape. Ensuring a successful and effective ERP deployment requires businesses to adopt those best practices that minimize disruptions and maximize returns on investments.

According to Gartner's report, around 55%-75% of ERP projects fail due to extended timelines or budget or fall short in fulfilling the basic purpose of manufacturing organizations.

A failed ERP implementation results in a huge loss for any organization, as it impacts the company on crucial fronts such as costs, productivity, and revenue. On the contrary, a successful ERP implementation benefits an organization in many ways including fulfilment of business requirements, adherence to compliance and standards, productivity & efficiency improvement, etc.

Article by
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1. Craft Your ERP Implementation Plan

To prevent yourself from being a part of the "failed ERP implementation" pack, start with performing a detailed analysis of your organization's current processes, pain points, objectives, and future goals.

Also, a plan or workflow should be drawn mentioning each stage including:

- Migrating data from the existing setup
- Creating an implementation roadmap
- Estimating the cost and allotting a budget to the implementation process.
- Setting up a real timeline for project completion.
- Performing post-implementation testing in a sandbox environment.
- Creating a training program for end-users, explaining the procedure to use ERP effectively.

Planning this way will help you break your ERP implementation program into manageable bits, and tick mark the tasks from to-do to done.

2. Select the Ideal Project Team

Choosing the most suitable candidate for a role proves advantageous, as this minimizes the likelihood of errors and delays in task execution. Similarly, during an ERP implementation process, choosing the right team ensures success.

- Appoint a project manager who will steer the project by providing direction and regular updates.
- Employ an application analyst to manage the data migration process.
- Enrol QA test engineers to evaluate the system post-installation to identify bugs and errors, if any.
- Change management experts that are responsible for executing the change and communicating across the organization, why this change is happening.

"Before implementing a new ERP system, evaluate existing systems to identify strengths and weaknesses."

3. Create an Effective Change Management Plan

Change management is the process of planning and implementing changes successfully within the organization. In this case, the change relates to switching to a new ERP platform.

Accepting a change is a psychological factor and assuming that people will accept your plans, can be a step towards ERP implementation failure.

An effective change management plan should be in place and must involve:

- Conducting a thorough analysis of all stakeholders involved in ERP implementation.
- Communicating the reasons for this change, the benefits ERP will bring, and the expected impact on day-to-day operations.
- Developing user training programs tailored specifically to train employees comprehensively about ERP.
- Performing regular evaluation programs to assess the effectiveness of the change management plan.

4. Ensure Data Quality and Precise Data Migration

An ERP implementation process is a perfect opportunity to refine all the organizational data and put it into a streamlined order. This is because, uncleaned, messy, and improper data might lead to poor decision-making, costing you millions.

- Begin by assessing your existing data thoroughly, identifying inaccuracies, inconsistencies, and redundancies.
- Figure out the requirements of the new ERP system such as supported data formats, standardized units, etc., and start transforming data accordingly.
- Instead of going in a go, divide the data migration process into manageable segments. This will facilitate easy validation, and quicker issue resolution, if any, and also minimize the impact of potential errors.
- Involve end-users in the data migration process to ensure the accuracy of the migrated data.
- Ensure strong collaboration between the data migration team involving IT professionals, data analysts, and end-users.

Article by Amarjeet Singh Bawa

5. Make Necessary Customizations

Customizations help manufacturers tailor the ERP software to meet their specific business needs. This enhances the system's functionality, benefiting companies on the productivity front.

However, it is necessary to incorporate only those customizations that are really needed, as unnecessary customizations increase the time, cost, and complexity of the implementation process. For this, a framework should be followed-

- Conduct a comprehensive needs analysis, identifying those specific requirements.
- Evaluate if the identified needs can be fulfilled with the selected ERP system.
- Assess the potential impact of the customizations on the system's overall performance.
- Conduct a cost-benefit analysis, justifying the needed investment in customizations.

"The next stage is to specify the objectives and scope of your ERP implementation project once you've evaluated your present systems and found areas that need improvement."

6. Select the Right Implementation Partner

When selecting an ERP, organizations need to have a specific criterion in mind based on their requirements.

A general criterion involves considering factors such as software's cost-effectiveness, scalability, user-friendliness, customization capabilities, and its overall ability to fulfil organizational needs. Based on these considerations, companies must look for an ERP that would be the best fit for their needs.

7. Ensure Effective Testing

The process of thorough testing helps identify the issues and errors before they impact the entire system. It involves validating ERP's functionality, its integration with the existing system, and alignment with the business processes.

- Involve end-users in the testing process as this will help you gather valuable feedback regarding its usability from those who will be using it daily.
- Check the system under different scenarios including routine operations and stress conditions, ensuring its reliable working under various circumstances.
- Also, check the system on other crucial fronts like data accuracy and security measures like user-access controls, to ensure the integrity of business information.

Final Thoughts

No organization would love to experience a chaotic ERP implementation project and remember it as a horror story. After all, nobody wants to lose hundreds of thousands of dollars along with their greatest resource "time."

While the ERP implementation process appears to be a complicated one, solid planning, proper resource allocation, and perseverance will help you navigate this journey easily. If you are considering adopting an ERP for your manufacturing unit and want to have a streamlined and flawless implementation then, BatchMaster ERP is for you!

About Amarjeet Singh Bawa

Amarjeet Singh Bawa serves as the Vice President, Professional Services & Support, at BatchMaster Software. He oversees a highly-talented global team of professionals responsible for implementations, project management, and organizational change management. You can connect with him on LinkedIn.

About BatchMaster

BatchMaster Software is one of the market leaders in offering enterprise software solutions for the process manufacturing industries. With an in-depth industry analysis, gained through a vast industry experience with over 3000 implementations worldwide, we clearly understand the unique industry challenges. BatchMaster offers ERP solutions that are apt to support industry specific operations and handles critical processes of the micro-verticals. Process manufacturing companies around the globe have come to rely upon BatchMaster® to manage nearly every aspect of their manufacturing distribution, finance & accounting, quality control and compliance. With headquarter in Laguna Hills, BatchMaster has its offices in India.

Mastering Your ERP Implementation: 10 Tips for a Winning Rollout

For many organizations, implementing an ERP system can be overwhelming. The technical challenges are high, and managing a project with limited staff and resources requires meticulous planning. Following these best practices will bring a winning result — and reduce your stress along the way.

ERP implementations can be daunting, especially if you're replacing a decades-old system. Back in 2018, Oracle estimated that the average age of on-premise ERP solutions is approaching 20 years, and many of these installations weren't the current version. If this sounds like your organization today, the good news is you may have an opportunity to leapfrog your current ERP capabilities and adopt cloud-based options, opening the door for significant benefits. Here are 10 best practices to help guide you through each step of your ERP upgrade.

1. Develop a robust contract

Ensure your organization has the right contractual protections. This often means not signing the initial contract provided by the vendor. Ensure that the proposal and request for proposal (RFP), as well as any clarifications, are incorporated into the contract. If the solution is cloud-based, make sure performance expectations are codified in strong service level agreements.

Your contract should also include disentanglement language and the ability to replace the vendor's project staff if needed.

Lastly, the contract should cover data protection. Your organization should know where its data is housed throughout the project, and have the ability to confirm that appropriate data protections are in place.

2. Establish a robust project structure

Your project management and governance structure is paramount for project success. It ensures that issues are raised to the appropriate executive level, and that risks and associated mitigation plans have executive support. It also facilitates timely and effective project decision-making. Your project structure should include:

- Senior executive sponsorship.
- Project leads who represent your organization's core departments, such as human resources, finance, and technology.
- Functional leads who represent the core department functions, such as payroll, budget, procurement, and benefits.
- Experienced project managers.

This structure should be supported by a project management office that has the tools for tracking issues, risks, decisions, and a mechanism for pushing critical items to the leadership team.

Article from Plante Moran

3. Form the "right" project team

The project team is a critical foundational element of any ERP project. Many organizations put a large focus on project management resources, and while strong project management is important, so is identifying team members who bring strong subject-matter expertise based on the needs of the project — whether that's technical, functional, or change management. Also focus on identifying staff who are empowered to make decisions and have availability to participate meaningfully in the project.

A major challenge is that selected team members typically must balance project responsibilities with day-to-day work requirements. This may require backfilling roles, or cross-training staff, so that others can take up portions of the key individual's job. It's important to continually monitor your team to avoid staff burnout or lack of staff capacity to achieve project timelines.

> "Your project management and governance structure is paramount for project success. It ensures that issues are raised to the appropriate executive level, and that risks and associated mitigation plans have executive support."

4. Plan and execute change management activities

The impact of a new ERP solution shouldn't be underestimated, especially if you're replacing an antiquated system. Early in the project, consider the impacts the new solution will have on internal and external stakeholders and develop and execute a comprehensive plan to address them. Your change management activities should include:

- ***Communications planning:*** Your communications plan should include a comprehensive description of key stakeholder groups, the mechanisms that will be used to reach those groups (i.e., website, newsletters, departmental meetings, etc.), the frequency of communications over the duration of the project, and who's responsible for the various communications.

- ***Project collaboration site:*** This site is where project staff collaborate and share project documents. It forms the "glue" of the project by providing a single source of information for team members, documenting the project's history, and providing version control over critical documents.

- ***Impact analyses:*** Here you analyze in detail the impact of a new payroll, time and attendance, and leave management system. It's likely that a new ERP system will have significant processing differences in these critical areas, and it's a common source of confusion for staff. It's critical to take the time necessary to analyze the differences between the old and new systems, and decide how the impact will be addressed.

Prepare a comprehensive change management plan and execute these tasks in conjunction with other project activities.

5. Trace functional specifications

Establishing comprehensive functional specifications is critical during the selection process, and later they'll become a cornerstone in the implementation and testing processes. It's essential that they're fully reviewed and vetted by module, which can be a time-consuming process. These functional requirements live on through traceability — from RFP and demonstrations, to implementation, testing, process and procedure manuals, and training materials. They must be detailed, clear, and paint an accurate picture of your future-state needs. It's a best practice to incorporate the vendor proposal and response to the specifications into the final contract to ensure contractual recourse in the event the vendor's solution doesn't meet all functional specifications.

6. Examine data conversion requirements thoroughly and develop comprehensive inventory of system interfaces

Consider what legacy data will be needed in the new system so the vendor can accurately predict the cost of conversion and impacts to the schedule. Data cleansing and preparation activities are often the customer's responsibility, as is the validation of converted data, therefore it's critical that you understand the staff and/or external consulting effort required. Organizations generally aim to convert one to three years of budget data and general ledger balances, but this varies with business need. With other items such as invoices, purchase orders, etc., frequently only open items will be included.

The scope can vary depending on each functional area, for example human resources, and each will have different requirements. Take a critical examination of the amount or history of data to be converted; the value may not be worth the effort and cost.

Sharing information between systems is one of the biggest challenges in an ERP implementation. Taking a comprehensive inventory of the systems that will remain after the upgrade — along with the information that flows in and out of them, the type of data, and the frequency of transfer — will help your systems integration vendor accurately estimate these costs and the impact to schedules.

7. Redesign the chart of accounts

The foundation of any ERP system is the chart of accounts (COA), which establishes the framework for the entire system. If your COA is outdated or misaligned, it can lead to inefficiencies, limited functionality, and user frustration. To maximize reporting capabilities, system functionality, and return on investment, it's advisable to undergo a COA redesign when migrating to a new system. The redesign should be completed prior to implementation to ensure adequate time and resources are dedicated to the effort.

8. Conduct comprehensive system integration and user acceptance testing

The most thoughtfully planned and executed implementations can suffer significant challenges if the new solution isn't thoroughly tested prior to go-live. Provide adequate time for your subject-matter experts to conduct testing prior to go-live: build a testing schedule into the project plan, identify the internal resources, and be prepared to pull in additional resources as needed. Testing activities should include:

- ***Unit testing:*** This covers testing of specific functionality configurations such as creating a requisition, accruing leaves, hiring an employee, etc. It's the first step in a testing plan, and often requires multiple iterations to get it right. Unit testing typically doesn't include automated workflows or produce custom reports.

- ***System integration testing:*** This includes testing of the configured application, using multiple, defined scenarios and detailed scripts (including automated workflows, interfaces, and reports) to verify the behavior of the software. This testing evaluates the system's compliance with your organization's business requirements, such as "hire to retire" and "req to check" processes, and creation of reports.

- ***User acceptance testing:*** This testing verifies system works as expected from the perspective of the end users who use the system every day.

In all cases, testing needs to be structured. This includes having defined scenarios, detailed scripts, expected outcomes, tracking of testing results, issues identified, resolution plans, and retesting as needed.

9. Allocate contingency funding

Over the history of ERP implementations, organizations often need to extend the timeline, exceed the original budget, or both. This may be due to unforeseen technical issues, scope expansions, underestimated staffing expenses, or other risk factors. It's important to identify a source of contingency funds during the initial planning process to account for these expenses. Typical cost overruns include the need for additional training, staff backfill, or new interfaces or reports that may be identified during the implementation. Your steering committee and executive leadership should be fully engaged in sourcing and approving the use of these contingent funds.

10. Require project oversight

Experienced project management is a key factor in a successful ERP project. Oversight teams should regularly assess project health, report their findings, and advise the steering committee and executive leadership on proposed actions. Reports should include project status, budget, risk and schedule reviews, along with comparisons to best-practice approaches. Larger organizations should expect significant challenges in enterprise application integration and data conversion and should strongly consider (or require) professional project oversight, and include the costs and benefits in their business case.

Many organizations are resource-challenged, and most will say they lack the level of resources needed to allocate financial and human resources for an ERP implementation. But with thorough planning and budgeting — and prudent staffing that includes advisors experienced in ERP implementations — you'll avoid cost overruns that can overwhelm a project, and reap the cost benefits associated with utilizing modern, more efficient technologies, and optimized staffing in your organization.

Solving Real-World Business Challenges with Oracle EPM

Organizations today, regardless of size or industry, face persistent challenges within their financial business processes. These obstacles hamper operational efficiency and growth, which delays decision-making and ultimately impacts overall business performance. From financial consolidation to reporting, budgeting and forecasting, the need for streamlined, accurate and timely financial operations is more critical than ever. Below are the real-world challenges organizations face in their financial processes, alongside practical solutions with Oracle Cloud EPM and the measurable value it delivers.

1. Challenge: Inefficiencies in multi-entity financial consolidation

Listen to how this challenge impacts business operations *here*.

Situation: ABC Corp, a US-based organization with subsidiaries in Canada and Mexico, is rapidly expanding across borders. However, beneath the surface lies a recurring challenge: month-end financial consolidation. Each cycle turns into a massive effort, with finance teams spending days collecting, translating and aligning financial data from multiple systems and currencies. Despite their best efforts, the process is prone to errors, delays and frustration.

Article by
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This process introduces several challenges:

- Disparate data sources make it difficult to standardize and reconcile information
- Manual processes increase the risk of errors and rework
- Complex adjustments slow down reporting
- Security risks arise from the use of offline spreadsheets and shared files
- Lack of visibility and data traceability hinders transparency
- Delayed insights affect timely decision-making

Solution strategy: Implementation of Oracle Financial Consolidation and Close Service (FCCS), a cloud-based platform that automates the entire consolidation process, addressing the issues of disparate data, manual work and security risks.

Business value

- Data automation: Ensure data accuracy, reduce human errors and facilitate a centralized workflow
- Global consolidation: Currency translation, intercompany elimination and consolidation
- Real-time reporting: Real-time balance sheet, profit and loss (P&L) and cash flow reporting
- Secure governance: Role-based user security and audit trail reports

2. Challenge: The burden of manual account reconciliation

Listen to how this challenge impacts business operations *here*.

Situation: At BTH Corp, the finance team braces each month for the same exhausting routine of account reconciliation. What should be a routine control process becomes a stressful, manual and inconsistent task. From reconciling and bank balances to general ledger entries, the team downloads data from multiple systems, each with its quirks. Spreadsheets become their main tool, but as discrepancies arise, they're forced into digging through mismatched records, outdated files and unclear audit trails.

> "Oracle EPM simplifies cloud-based financial reporting and planning."

This leads to a range of challenges:

- Manual data collection from various systems, each with its own inconsistencies
- Data discrepancies in invoices, payments and balances that fail to match across systems
- Lack of standardization in reconciliation methods, causing inconsistent outcomes
- No audit trail, making error resolution nearly impossible
- Delayed close cycles due to the manual, fragmented process
- Increased labor and resource costs with no real-time visibility or system of record

Solution strategy: Implementation of Oracle Account Reconciliation Cloud provides standardized workflows and real-time visibility. The solution helps in improving accuracy and accountability while guiding the finance team to close faster with fewer errors and greater efficiency.

Business value

- Data automation: Ensure data accuracy, reduce human errors and facilitate a centralized workflow
- Regulatory compliance: Built-in controls and tracking improve compliance with regulatory standards
- Faster closing: Faster month-end close and improved resource productivity
- Secure governance: Role-based user security and audit trail reports

4. Challenge: Disconnected month-end close process

Listen to how this challenge impacts business operations *here*.

Situation: CNC Corporation's month-end closing process involves coordinating tasks across subledgers, ledgers, consolidation and reconciliation systems. However, the process is anything but coordinated. Analysts across functions operate in silos with no shared roadmap, no central task tracking and no real-time visibility. As deadlines approach, stress escalates due to missed handoffs, delayed approvals and critical dependencies on key individuals, resulting in inefficiencies and repeated last-minute firefighting.

The process creates below challenges:

- Inefficient data tracking workflow management leads to duplicate efforts and missed steps
- Approval bottlenecks and delays due to email communication rather than an automated workflow
- Increased risk of non-compliance due to no proactive alerts about issues or delays
- Manual communication and handoffs lead to confusion, delays and missed responsibilities.

Solution strategy: By implementing Oracle Close Manager within the FCCS suite, organizations can streamline their entire close process. The solution offers centralized task orchestration, automated handoffs and integrated approval workflows.

Business value

- Time efficiency: Automated data updates and workflows reduce reporting time and effort
- Standardized reporting: Consistent and professional report formatting
- Data accuracy: Real-time data syncing ensures the most up-to-date reports
- Rapid distribution: Faster report distribution and stakeholder access
- Smarter decisions: Timely insights empower leaders to make faster, more informed decisions

5. Challenge: The cost of clinging to Excel for planning

Listen to how this challenge impacts business operations *here*.

Situation: A retail company where each department manager handles budgeting independently, using complex Excel files. These spreadsheets are filled with multi-layered formulas that calculate costs based on different drivers. Everything is done manually, including data entry, formula checks and verification. There is a lack of 'what-if' scenarios, collaboration issues and an absence of modern artificial intelligence (AI) tools to improve the company's planning and efficiency.

Challenges impacting their planning process:

- Fragmented and disconnected systems, leading to misaligned operations
- Manual calculations and data transfers
- Lack of centralized visibility and collaboration
- Limited real-time insights and scenario planning
- Outdated tools hindering modernization, failing to adapt plans to market conditions

Solution strategy: Oracle's EPM Planning enables collaborative, driver-based budgeting and forecasting that allows decision-makers to test 'what-if' scenarios and provides them with the insights needed to plan proactively and strategically.

Business value

- Integrated accuracy: Unified data sources and automation ensure accurate planning inputs
- Process automation: Replaces manual work with intelligent, automated workflows
- Collaboration: Centralized planning environment fosters cross-functional collaboration
- AI-driven forecasting: Enables 'what-if' analysis and scenario planning

"Learn how to solve key finance challenges—read the full article now."

6. Challenge: Lack of transparency and control in cost allocation

Listen to how this challenge impacts business operations *here.*

Situation: A mid-sized manufacturer and a leading producer of electronic components is struggling to allocate expenses accurately across departments. Their allocation engine provides the finance team with no visibility into how costs are assigned, making actual reporting difficult and planning nearly impossible. Any changes to the allocation logic require the information technology (IT) team's support and weeks of turnaround time. The allocation logic only applies to actuals in the enterprise resource planning (ERP) system; budgeting and forecasting teams cannot test or model alternate scenarios.
Challenges faced in cost allocation:

- Lack of traceability and visibility with zero transparency into how costs are allocated
- Rigid, code-intensive ERP processes, hence the reliance on IT
- Disconnected actuals and forecasts, leading to planning blind spots

- Manual workarounds using spreadsheets, increasing error risk
- Risk of misallocations & compliance issues

Solution strategy: Oracle Profitability and Cost Management offers a robust solution to bring transparency, flexibility and control back into the hands of finance. It empowers teams to model multiple allocation scenarios, align actuals with planning and make faster, insight-driven decisions.

Business value

- Transparent audits: Clear traceability of allocations makes audits easier and builds stakeholder trust
- Agile efficiency: Flexible, user-managed models reduce dependency on IT and accelerate turnaround time
- Financial integrity: Improved allocation accuracy helps mitigate compliance risks and strengthens financial reporting
- Insightful reporting: Better visibility into costs supports more strategic planning

7. Challenge: Fragmented metadata governance across financial systems

Listen to how this challenge impacts business operations *here*.

The town of Harmonyville relies on multiple financial systems to manage its operations. While each system is crucial, they operate in silos with separate administrators managing metadata independently. Key hierarchies like cost centers, funds, departments and reporting structures were shared across systems but not integrated. A simple update like adding a new cost center means manual entries across five different systems.

Challenges faced in metadata governance:

- Manual and lack of centralized metadata entry across multiple systems
- No synchronization between applications, leading to inconsistent hierarchies
- High risk of data inaccuracy and compliance issues
- Time-consuming and labor-intensive to identify the source of discrepancies
- Slow and unreliable metadata updates impacted reporting accuracy

Solution strategy: Oracle Enterprise Data Management (EDM) offers a centralized platform for creating, managing and governing metadata across systems. With seamless synchronization to all subscribing applications, it reduces manual effort, eliminates duplication, ensures consistency and improves data reliability.

Business value

- Metadata accuracy: Centralized control improves metadata quality and consistency
- Efficient maintenance: Streamlined workflows cut down manual efforts and speed up metadata updates
- Compliance: Standardized metadata governance strengthens data security and regulatory compliance
- Scalable architecture: Centralized integration reduces IT burden and scales with organizational growth

In conclusion, organizations across various industries and sizes face common challenges in their financial business processes. These obstacles can impede growth, operational efficiency and decision-making capabilities. By tackling challenges in financial consolidation, closing, budgeting, forecasting, allocations and reporting, Baker Tilly can empower your organization with the knowledge and tools to optimize your financial operations.

We help organizations transform complex financial and operational challenges into streamlined, scalable solutions using Oracle's suite of powerful tools. Baker Tilly is a premier Oracle PartnerNetwork Member, with global capabilities across Oracle's Cloud platforms, including Analytics, EPM, ERP, HCM and SCM.

Article by Prasad Joshi

How to Get Supply Chain Optimization Right: An Interview with Acumatica Distribution Product Manager Kelly Squizzero

In today's blog, Kelly Squizzero, Acumatica's Senior Product Manager for Distribution, explains the essentials of supply chain optimization: what it is, why it matters, proven strategies for success, common challenges businesses face, how to select the right optimization software, and emerging trends shaping the future.

Supply chains are the connective tissue of the global economy, making all commerce possible. Their importance cannot be overstated, yet they are filled with near-infinite, constantly changing variables.

Predictions still have to be made about those variables, and those predictions are the foundation for business decisions. They have to be accurate, and supply chain processes across the board have to run like a well-oiled machine. These are some of the most important steps and biggest challenges today's businesses face.

With this in mind, I sat down with Kelly Squizzero, Acumatica's Senior Product Manager for Distribution, to talk about supply chain optimization. In this blog, you'll hear from her about proven techniques for achieving optimization, challenges that can get in the way, the advantages of having an optimized supply chain, and how to choose the best supply chain optimization software for your business.

Article by
Anna Elizabeth Gant,
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How would you define supply chain optimization?

Supply chain optimization focuses on making the supply chain work better. This means improving how products move from suppliers to customers. Optimization involves using technology to cut costs, increase profits, and deliver products on time.

Why is supply chain optimization important? What role does it play in improving overall business performance?

Supply chain optimization makes operations smoother and more efficient. *When tedious tasks are automated*, employees can focus on more important work. Meeting customer demands with accurate information and timely deliveries enhances satisfaction. *Efficient inventory management* reduces waste and ensures products are available, saving money. Overall, a well-optimized supply chain makes a business more agile and competitive in the market.

> "Supply chain optimization focuses on making the supply chain work better. This means improving how products move from suppliers to customers. Optimization involves using technology to cut costs, increase profits, and deliver products on time."

What are some common supply chain optimization techniques?

- *Distribution Requirements Planning (DRP)*, which uses forecasts and real-time demand to ensure the right products are in the right place at the right time.
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- Efficient *Warehouse Management*, which can be accomplished by using barcode scanning to guide staff, automating the packing process, and integrating with *carriers for shipping.*
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- Ecommerce and *Point-of-Sale (POS)* Systems, which streamline the customer experience, supporting their desire for self-service and making transactions smoother and faster.
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- And *leveraging AI* for *anomaly detection* to monitor irregularities in key business areas, such as sales order margins, accounts payable bills, and accounts receivable.

What core principles should organizations adhere to when they apply these techniques?

Transparency and collaboration are key. Sharing information openly with suppliers, customers, and employees builds trust, prevents errors, and improves efficiency. With all processes clear and open, everyone can understand the operations, make informed decisions, trust the system, and work together to achieve common goals.

Proactive, continuous monitoring also helps—regularly checking and adjusting strategies based on real-time data. This way, businesses can identify issues quickly and make necessary improvements.

Finally, use reliable, *ethical AI tools*. Trustworthy AI developed in a responsible, practical, and valuable way ensures data privacy and security, can be seamlessly integrated with existing workflows, and delivers tangible business benefits.

What are some common challenges businesses face with supply chain optimization? How can they be mitigated?

Supply chain disruptions are a major issue, with delays, increased shipping costs, and inventory shortages caused by global conflicts, economic instability, and natural disasters. To address this, businesses can diversify suppliers and use advanced planning tools to anticipate disruptions.

Inventory management is another challenge. Managing *thousands of SKUs* without a system that can handle them leads to overstocking, stockouts, lost sales, and higher holding costs. Automated inventory systems track stock levels and predict demand, reducing these risks.

Technology integration is crucial. Many distributors use patched-together solutions with fragile integrations, making upgrades difficult and risky. Investing in *robust, integrated, easy-to-use systems* provides a stronger technology base and improves efficiency.

And *customer retention* is vital, of course, but it's also challenging. Offering personalized care, timely deliveries, and consistent product availability is essential, but balancing these demands with operational hurdles can be tough. Businesses can improve customer retention by enhancing service levels and using technology to streamline operations.

Article by Anna Elizabeth Gant

> "Transparency and collaboration are key. Sharing information openly with suppliers, customers, and employees builds trust, prevents errors, and improves efficiency."

Are there any unexpected advantages companies often overlook when optimizing their supply chains?

While businesses often recognize that supply chain optimization improves customer satisfaction, they may not realize it also boosts employee satisfaction. Steps taken to streamline processes lead to less chaos and a more meaningful flow of work. Employees get to focus on purposeful tasks rather than constantly dealing with problems. Happier employees feel better about their work and find it more meaningful.

When distributors optimize supply chains, they reap another advantage. Distributors are crucial to supply chains, sitting in the middle and connecting suppliers with customers. By improving supply chain processes, *distributors can enhance their value* and demonstrate their importance. This is an opportunity to overcome disintermediation by carving out a niche—for instance, offering specialized services that set them apart from competitors.

Lastly, companies often miss the potential for improved sustainability and reduced environmental impact. Optimized supply chains lower energy consumption and waste. Real-time data analytics can help identify areas for sustainability improvements by pinpointing inefficiencies and suggesting greener alternatives. By focusing on sustainability, companies help the environment, enhance their reputations, and reduce costs.

What effects have technological advancements had on supply chains and supply chain management processes?

Technological advancements have significantly transformed both. Automation streamlines operations, reduces manual tasks, and improves efficiency. Real-time data analytics provide up-to-the-minute visibility into inventory, order statuses, and shipping, allowing businesses to make informed decisions quickly. Integration *of ecommerce and POS systems* has enhanced the buying experience, making transactions smoother and faster.

Cloud technology and the mobility it brings have revolutionized supply chain management by providing scalable, secure solutions that can be accessed anytime, anywhere, on any device with an internet browser. These solutions, like Acumatica, ensure data is always available and up-to-date, facilitating real-time collaboration and decision-making. The cloud also reduces the need for on-premises infrastructure, lowering costs and simplifying *IT management*. In the warehouse, mobile devices enable employees to manage inventory, *process orders*, and handle customer inquiries on the go, enhancing flexibility and responsiveness.

More recently, *AI and machine learning* have introduced advanced capabilities, like *anomaly detection*, which can identify irregularities in sales order margins, *accounts payable* bills, and *accounts receivable*. This improves accuracy and helps prevent fraud.

Overall, these technological advancements make supply chains more efficient, responsive, and resilient, helping businesses stay competitive in a rapidly changing market.

> "Supply chain optimization makes operations smoother and more efficient. When tedious tasks are automated, employees can focus on more important work."

What features should be prioritized when selecting supply chain optimization software?

Businesses should look for software that is *industry-specific*—that provides solutions tailored to their unique industry needs. They should also look for a *user-friendly interface* with automated workflows that streamline supply chain tasks. Real-time visibility of inventory, orders, and shipments is crucial, as is built-in mobility. The system should integrate with other mission-

critical applications and let users *customize workflows with little to no coding*. Practical, built-in AI will also enhance decision-making and operational efficiency. And, perhaps most importantly, the system should be built to scale with the business as it grows.

What criteria should businesses use to identify the best supply chain optimization software for their needs?

In addition to choosing a system with the features I just mentioned, businesses should also look at the software vendor. What is the vendor's *technology vision and direction?* Is it forward-thinking and practical? How much knowledge of and experience with your industry does the vendor have? Do they offer *support*, including *ongoing training*, technical assistance, and customer service? Is that training comprehensive and reasonably priced? In the best instances, *it should be free*. How does the vendor treat their customers? Acumatica's *Customer Bill of Rights* outlines what today's customers should expect from a business management software vendor. Does the vendor have a *strong user community* of people working together, giving each other valuable support, feedback, and collaboration? And what will your total cost of ownership (TCO) be? This includes licensing, implementation, and maintenance costs. The vendor should be transparent about this pricing, so you can calculate your TCO and return on investment (ROI) before buying the software.

What emerging trends do you see shaping the future of supply chain optimization?

Companies will continue to "go digital." More small and midsized distributors are using digital tools

> "Optimized supply chains lower energy consumption and waste. Real-time data analytics can help identify areas for sustainability improvements by pinpointing inefficiencies and suggesting greener alternatives."

to make their operations smoother and more efficient. I believe we will see even more ecommerce growth, as distributors keep improving their websites and linking those websites to their business management systems. Businesses will also personalize the customer experience, pursue mobile tech, and implement AI tools to help with predicting demand and managing inventory. And eco-friendly practices will increase in the forms of greener packaging, optimized delivery routes, and energy efficient operations.

What are the top three takeaways you would like to share with businesses looking to optimize their supply chains?

1. Embrace technology to enhance visibility and efficiency.

2. Foster collaboration across all supply chain stakeholders.

3. Continuously monitor and adapt strategies based on real-time data.

Is there any final advice you would give to companies starting their supply chain optimization journey?

Start with a clear understanding of your current supply chain processes and identify key areas for improvement. Invest in scalable and flexible technologies and prioritize building strong relationships with suppliers and partners to ensure a collaborative, resilient supply chain.

For more information on supply chain optimization and how a holistic business platform can help your business achieve real-time visibility, minimize costs, and streamline transactions, explore *Acumatica Distribution Edition.*

Acumatica
The Cloud ERP

About Acumatica

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future. For more information, visit acumatica.com or follow us on LinkedIn.

Article by Anna Elizabeth Gant

AI in Action: Start Small, Scale Fast with IFS.ai

In today's fast-paced digital world, businesses need innovative solutions to stay competitive. That's why we're excited to introduce the IFS.ai Activation Pass, a game-changing offering designed to help enterprises seamlessly integrate AI into their operations with zero risk.

Launched at IFS Connect Nordics, this initiative is set to transform how companies approach AI, turning ambitions into actionable results.

The IFS.ai Activation Pass comes in the form of a subscription with access to all AI use cases embedded in IFS Cloud, giving the ability to get started immediately. This ensures that companies can explore and scale AI capabilities without the fear of unpredictable costs. It's the perfect entry point for enterprises ready to move from AI experimentation to execution.

Article by
Matt Kempson,
SVP Group Commercial, IFS

What is it?

The IFS.ai Activation Pass, gives full platform access with every available IFS.ai Use Case available for the relevant version of IFS Cloud. With full transparency on the Usage, the package has been sized to allow any organization to test and pilot every Use Case among multiple business communities. In addition, with IFS Value Studio, it's easy to track ROI and make the case for further investment in further roll-outs and capabilities. This model co-terms with the IFS Cloud Agreement, and allows predictability of costs as the organization tests the AI capabilities to the point of scale.

Who is it for?

This new offering is designed for IFS customers ready to move from AI experimentation to execution, without long lead times or complex implementations. It helps organizations improve planning, operations, and productivity, while strengthening resilience and meeting sustainability targets. Any IFS Cloud customer can benefit, and it is now available for customers hosted by IFS or utilizing the Remote option.

Why now?

With global supply chains under pressure and the regulatory and geopolitical landscape evolving, enterprises need intelligent tools to anticipate disruption and make better decisions. IFS Cloud, with embedded AI, helps customers turn complexity into opportunity and demonstrate real actionable returns from AI investment in the space of weeks.

> "The IFS.ai Activation Pass comes in the form of a subscription with access to all AI use cases embedded in IFS Cloud, giving the ability to get started immediately."

How is it different from IFS Nexus Black?

IFS Nexus Black, launched in April 2025, is a co-innovation program for visionary customers building next-gen AI capabilities. In contrast, IFS.ai Starter Pack is a ready-to-deploy offer available to all customers seeking immediate, measurable results. *Learn more about Nexus Black.*

Introductory offer

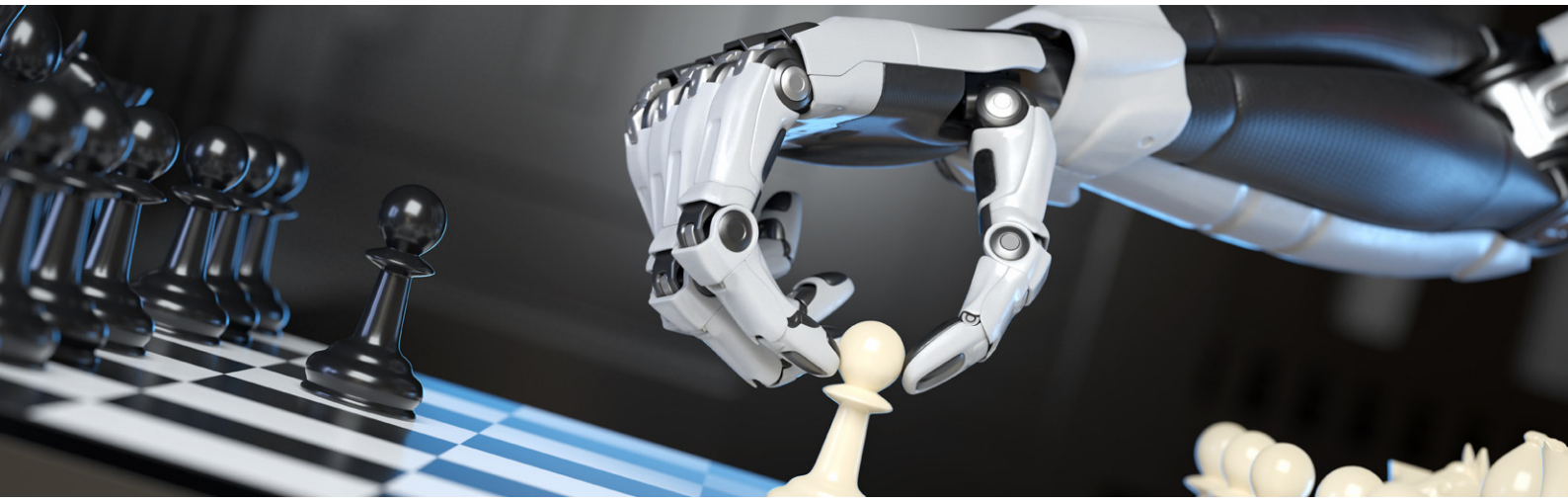
The IFS.ai Starter Pack is available as an introductory offer for customers until June 30, 2025. It allows businesses to explore and scale AI with zero risk and clear value. Customers will have access for the full 12-month subscription period. See it in action: *IFS Connect* attendees can experience IFS Cloud and IFS.ai first-hand, with live demos and customer use cases showing AI in action.

Explore further:

Read our latest guide: *A Guide to Future Industry Success Through AI Leadership.*

About Matt Kempson

Matt Kempson is a thought leader in industrial AI and enterprise transformation. With a career beginning in the industrial sector and going deep into tech, Matt brings first-hand experience of the challenges and opportunities facing asset-intensive businesses. At IFS, he leads strategic initiatives that help organizations harness AI-driven insights to improve productivity, resilience, and competitiveness. His perspective bridges operational realities with cutting-edge innovation, making him a trusted voice on the future of intelligent industry.



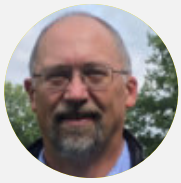
Article by Matt Kempson

QAD EQMS Spring 2025 Release: Driving Excellence in Quality Management

We are pleased to announce the Spring 2025 release of QAD EQMS (Enterprise Quality Management System). The Spring 2025 release builds on industry needs and customer feedback to support efficient and compliant manufacturing processes through an intuitive user experience. We would like to thank all those customers who have submitted ideas in our Idea Portal and especially those who collaborated with us to finalize requirements, review designs, and provide feedback on the final product for this release!

Driving Operational Excellence

The QAD EQMS Spring 2025 release includes *significant improvements* and is focused to help you achieve operational excellence, effectiveness and efficiency. The improvements include:



Article by
Brian Brooks,
Director, Product Management,
QAD

- ***Streamlining Processes:*** We added the Responsibility Updater feature that allows open tasks to be assigned to another person when the original person leaves the company or changes responsibility. By automating and simplifying key quality management processes, we are helping you reduce manual effort and minimize errors.

- ***Enhancing Visibility:*** We added Progress Indicators and days aged to search screens so managers can get visibility to records stalled or progressing through their workflow too slowly. With improved reporting and analytics, you will gain deeper insights into your quality data, enabling you to make more informed decisions.

- ***Improving Collaboration:*** We added the ability for users to @mention others on any record to build awareness, get assistance, and drive to timely closure. We are committed to fostering collaboration across your organization, ensuring that everyone is aligned and working towards the same goals.

- ***Ensuring Compliance:*** For medical device customers, we added the capability to manage Device Master Records for medical device manufacturers and we improved upon the Design History File capabilities that we released last fall. With robust compliance features, you can be confident that you are meeting regulatory requirements and industry standards.

Why Choose QAD EQMS?

QAD EQMS is more than just a compliance software solution. In 2025, enabling compliance is foundational and the differentiator is in your ability to develop good first-time quality, customer satisfaction, *risk mitigation*, and margin improvements. When quality is good, your customers think of you first and costs are minimized.

> "With improved reporting and analytics, you will gain deeper insights into your quality data, enabling you to make more informed decisions."

We understand the unique challenges manufacturers face, and are dedicated to providing you with the solutions you need to succeed. Our comprehensive EQMS platform offers:

- ***Industry-Specific Functionality:*** Built for manufacturers, QAD EQMS addresses the specific needs of your industry.

- ***Scalability and Flexibility:*** Our solution can grow and adapt with your business, ensuring long-term value. In cases where our built in industry best practices need to be further catered to unique needs, our easy, no-code extensions provide that "last mile" fit.

- ***Seamless Integration:*** QAD EQMS integrates seamlessly with other QAD solutions and common enterprise systems.

- ***Expert Support:*** Our team of experts is always available to provide guidance and support through all aspects of your journey to excellence.

Driving Excellence in Quality Management

The *QAD EQMS* Spring 2025 release is a reflection of our commitment to innovation and customer success. It provides manufacturers with the solutions and insights you need to drive excellence, ensure compliance, and achieve their quality goals. We look forward to partnering with you.

About Brian Brooks

Brian is an expert in the design, development, and management of quality management systems, and has over 25 years of leadership experience in manufacturing software and technology. He joined QAD in 2012 with the goal of developing highly adopted solutions that are easy to use and have rapid time-to-value. Brian currently serves as Director of Product Management for the QAD EQMS solution. He believes that waste happens when we don't ask or understand the "why?".

Article by Brian Brooks

How Digital Transformation is Powering the New Era in Manufacturing

By integrating digital tools with a modern ERP system, manufacturers can unify processes, optimize resources, and drive sustainable growth. Understand three key strategies behind these innovations.

How Digital Transformation is Powering the New Era in Manufacturing

Digital transformation in manufacturing is setting new benchmarks for operational excellence. Manufacturing leaders who invest in modern ERP platforms, AI-driven automation, and scalable personalization stand to unlock remarkable efficiency and redefine what's possible for their businesses. This article outlines three key strategies shaping the future of manufacturing and explains how partnering with an experienced solution provider can accelerate this process.

Building Unified Data Systems with Modern ERP

Unified data systems are the backbone of responsive, efficient manufacturing. Today, modern enterprise resource planning (ERP) platforms, such as SAP S/4HANA, have evolved from basic transaction processors to become the central hub of manufacturing operations. These sophisticated systems connect operations across production planning, inventory management, supply chain logistics, and financial processes.

With cloud-based ERP solutions, manufacturers gain real-time visibility into business-critical information, supporting faster decision-making and seamless global collaboration. Integrated analytics and automation reduce manual entry and streamline workflows, while advanced integration platforms like SAP Business Technology Platform (BTP) enable rapid adaptation to market changes. The result? Lower operational costs, improved supply chain visibility, and faster, more accurate responses to internal and customer needs.

> "Digital transformation in manufacturing is setting new benchmarks for operational excellence."

Capitalizing on Smart Technology for Process Excellence

Smart manufacturing technologies have moved beyond pilot tests and now drive comprehensive digitalization strategies across leading manufacturers. The combination of artificial intelligence, Internet of Things (IoT), and advanced analytics helps manufacturers to anticipate problems and continuously refine operations.

IoT-equipped machines deliver a constant stream of health and performance data, enabling predictive maintenance that reduces unplanned downtime by as much as 50%. AI-powered analytics identify process improvements and quality opportunities in real time, while robotic process automation (RPA) offloads repetitive tasks from human staff, maximizing productivity. Digital twins and advanced monitoring tools further extend equipment life and inform strategic decision-making. By deploying these smart technologies with guidance from experienced partners, manufacturers can build more agile and reliable operations.

Achieving Profitable Personalization at Scale

Personalized products are no longer a luxury in the manufacturing sector; they have become a competitive necessity. Modern customers expect offerings tailored to their specific requirements, even in small batches. This shift toward 'lot size one' production presents operational challenges that can be overcome with the right digital tools.

Adaptable production systems powered by digital technology allow rapid reconfiguration for different product specifications, supporting both custom and standard manufacturing. Advanced configuration platforms enable customers to design products online while ensuring manufacturability, with instant synchronization to production planning. Data-driven supply chain solutions provide the flexibility needed for complex material combinations, and IoT-enabled products help manufacturers deepen customer relationships through proactive service and usage insights. Add it all together, and these capabilities turn personalization into a profit center.

Unlocking Value with Expert Partnerships

Manufacturers seeking digital transformation should also consider more than just technology. Strategic partnerships with an experienced digital business and IT services leader, such as NTT DATA Business Solutions, deliver deep industry expertise, robust implementation support, and fully integrated technology landscapes that leverage the power of SAP. Such collaboration helps you accelerate the transformation process and gives you more time to focus on innovation and performance.

Investing in a modern ERP platform that provides scalable automation and flexible production capabilities is not a future imperative but a present necessity. Manufacturers who leverage these essential strategies will set new standards for efficiency and customer satisfaction.

Shaping the Future of Manufacturing

Manufacturing organizations that adopt unified data systems, deploy smart technologies, and deliver profitable personalization are best positioned to thrive as market conditions continue to change. By partnering with experts in the field, industry leaders maximize their digital investments and set a new course for sustainable growth.

For a deeper dive into this topic, *download the e-book*.

NTT DATA

Article from NTT Data

Six AI-Accelerated, Proactive, and Preventative Methods Transforming SAP's Customer Support

Today we can finally see the consumer version of what futurists, writers, and filmmakers have been conceptualizing for long: AI that can predict events and outcomes even before they happen. When Isaac Asimov foresaw cars with "robot brains," he described a fictional technology that would fuel such an invention. Seven decades later, autonomous cars are a reality because of AI's ability to analyze vast amounts of data from sensors, cameras, and other sources. And these proactive, predictive, and preventative capabilities of AI are equally applicable in almost any industry today, for example in healthcare with AI-powered wearables, retail with optimization of inventory for high-volume sales, or manufacturing with maintenance through anomaly detection.

When it comes to customer support, these capabilities are game-changing not only for current applications but also for future implications. The way businesses deliver support is improving every day, thanks to the rapidly evolving framework: technological breakthroughs, business innovations, and process agility. Here are six key methods that can transform the delivery of customer support.

Article by
Stefan Steinle,
Executive Vice President,
Global Head of Customer Support
& Cloud Lifecycle Management

1. Real-time monitoring

With AI-infused features in diagnostics, an electric car can detect potential malfunctions and schedule its own service appointment automatically, preventing issues like battery depletion or tire pressure drops before they become critical.

How does real-time monitoring play out in the world of business software? SAP Cloud ALM provides a feature-rich observability platform that can collect telemetry data, like metrics, logs, and traces, from applications and their supporting infrastructure, allowing support teams to review the health of these systems. By providing real-time analytics and a centralized dashboard, SAP Cloud ALM helps empower IT teams to quickly respond and fix issues, so the business remains operational with minimal interruptions. Additionally, the use of OpenTelemetry standardizes observability within a modern customer landscape.

> "The SAP Cloud ALM solution has been instrumental for our IT operations. It offers real-time insights and seamless integration across all our enterprise applications, making everything run more smoothly. It's like having a bird's-eye view of our operations, ensuring efficiency and helping us stay proactive rather than reactive."

2. Proactive resolution

Customer feedback loops play an important role in improving products and services and refining customer relationships. Repeat requests, in customer and user feedback, help service providers identify critical needs and also prioritize features to be delivered.

For example, users within SAP Business Network and SAP Ariba solutions go to the help center for self-service or case assistance 10.8 times less than they did years ago. This drop in end-user support sessions is the result of features that have been built into the product, based on customer feedback.

AI-enabled outbreak detection is another significant process in proactive resolution that allows support teams to address unexpected increases in anomalies, customer complaints, or issues.

> "We continuously identify the reasons for frequent customer demands and challenges from inquiries raised to SAP support. This allows SAP to proactively deliver the most impactful product changes before they become a challenge for more customers. This way, we improve our products while also focusing on key product capabilities used by our customers today."

3. Predictive analytics

In the retail industry, predictive analytics is used effectively for proactive and preventative support. One prominent example is SAP's holiday season readiness program, which helps position SAP as a front-runner in AI-driven, predictive, and proactive support solutions. With the goal of issue prevention at its core, the program can provide a comprehensive, 360-degree customer support profile, helping to accelerate issue detection and anticipate potential problems with AI-driven features like a virtual support assistant, resource prediction, web traffic prediction, a recommendation engine, case history analysis, issue correlation, and pattern recognition.

> "During Cyber Week 2024, SAP's holiday reason readiness program equipped our support and ops teams to achieve 100% uptime for our customers with the predictive, proactive, and bi-directional support model implemented by the program."

4. Customer journey mapping

SAP Signavio solutions can help businesses visualize the end-to-end customer journey, tracking interactions across different touchpoints. This enables companies to identify areas of improvement in their customer support processes, leading to more personalized and effective interactions.

Article by Stefan Steinle

With the help of SAP Signavio Process Intelligence, SAP can successfully map support processes to help implement AI improvements for optimizing our services. The result: a 100% increase reported in customer value.

For example, a business that struggles with connecting customer experience data and operational data can take advantage of the SAP Signavio Journey-to-Process Analytics solution to help reduce time to insight and uncover anomalies and trends.

5. In-app support

Seamlessly integrating support features in a product, service, or system gives users easy access to directly request assistance within the interface, without needing to contact a support team or leave the platform. Built-In Support can include contextual, AI-assisted, self-service options like help application-specific documentation, troubleshooting tools, knowledge bases, and FAQs or real-time options like live chats with support engineers.

For example, WalkMe solutions and Built-In Support—layered over multiple applications in a business workflow—can provide real-time, proactive, in-app guidance to users, helping to significantly reduce the need for live assistance or support tickets.

> "Context significantly enhances the quality of support. Built-In Support works like a pit stop at a racetrack. The repair crew is right where the action is. The interruption is brief and far less disruptive than taking your car to the workshop, ensuring a smoother return to your activities. In the context of your company, this helps you win your business race."

6. Proactive mindset

None of the tools and processes that we deploy to implement a proactive and preventative support strategy are sustainable if our teams are not tuned to a proactive mindset. I believe high-performing support teams deliver the best results with a combination of human-machine collaboration, in a culture that promotes a forward-thinking, outcome-driven, service-oriented, and data-driven mindset.

At the end of the day, the best issue is the issue that we can prevent. Proactive and preventative support is not just about solving problems, but about creating peace of mind for end users, customers, partners, and support engineers so every customer receives custom care, even before they need help.

> "Knowledge management within support is not just about enabling self-service through portals to deflect incoming tickets, but about eliminating the need to come to the support portal in the first place."

About SAP

As a global leader in enterprise applications and business AI, SAP stands at the nexus of business and technology. For over 50 years, organizations have trusted SAP to bring out their best by uniting business-critical operations spanning finance, procurement, HR, supply chain, and customer experience. For more information, visit www.sap.com.

GTSE Makes Seamless U.S. Expansion with Avalara and BigCommerce

Avalara, Inc., a leading provider of tax compliance automation software for businesses of all sizes, announced that GTSE is leveraging the Avalara for BigCommerce integration to enable the company's growth into the U.S. market.

GTSE, a U.K.-headquartered company founded in 2014, primarily sells cable ties (also known as zip ties) and tapes as well as other consumable trade supplies — from automotive components to cable management and electrical wiring.

In 2020, the company used Amazon's platform to start selling into the U.S. market and built its own U.S. website in 2023 due to exponential sales growth. Already leveraging BigCommerce as its ecommerce engine, GTSE implemented Avalara in November 2023 to solve its growing tax compliance obligations, and now uses both *Avalara AvaTax* and *Avalara Returns*.

"We are expecting exponential growth in the U.S. in the next 12 months and are investing heavily in inventory and infrastructure to support that growth, so it's safe to say that we'll need to register in a lot more states," said Tom Armenante, Director of Ecommerce at GTSE. "We are selling B2B and therefore will also be looking at the monitoring of sales tax exemption certificates as part of our ongoing tax compliance monitoring. With Avalara, we feel more than ready."

"We're proud to be with customers like GTSE every step of the way to help ensure they're compliant within new jurisdictions while expanding across borders," said Liz Armbruester, EVP, Customer and Compliance Operations at Avalara. "Through great relationships with ecommerce partners like BigCommerce, Avalara offers a simplified process for merchants to automate tax compliance and improve accuracy while reducing costs."

Find more information about the Avalara and GTSE success story *here.* To learn more about how Avalara automates tax compliance requirements for businesses on the BigCommerce platform, click *here.*

Press Release from Avalara

Atigro Launches ERP Transformation Services and AI Toolkit for Construction & Engineering Management Companies

Atigro, a proven ERP transformation through augmentation firm, has launched Atigro AI-ERP CEM. It is a set of ERP augmentation services paired with a secure AI toolkit that revitalizes construction and engineering management (CEM) companies' existing ERP assets. It does this by taking a CEM's existing ERP and adding modularly augmented functionality in combination with strategically layered AI-native frameworks. This transformation through augmentation provides CEM's with real oversight, control and efficiency in their business operations.

Atigro AI-ERP CEM is tailored to meet the needs of the labor intensive CEM industry, delivering executives new levels of ERP capabilities. These include the ability to collect granular, contextual data and business processes to lay the foundation for strategically layering on AI capabilities. This is expected to give CEMs a revitalized ERP asset that can be leveraged to gain more control over their operations, address more business opportunities and drive profitability through true advancements in productivity.

"Most 'ERP transformations' essentially tear down and rebuild the ERP platforms with new functionality, which is both costly and time consuming. Even worse, they still don't address one of the biggest issues, revamping ERP systems quickly enough to meet the fast changing business environment. This means the very processes that a company is looking to manage within the ERP platform have likely changed since the customization request was made," said Ken Fischer, CEO of Atigro, Inc. "At Atigro, our proven methodology of ERP transformation consists of

augmenting ERP assets with more granular, contextual data collection and functionality capabilities, in combination with strategic and impactful AI integration. Atrigro's AI-ERP CEM augmentation allows for rapid development and provisioning of new functionality that address dynamically changing business processes. Atigro's transformation through augmentation quickly revitalizes ERP assets, at lower costs, while significantly increasing our clients' productivity and ROI."

IT Challenges For Construction & Engineering Management Companies

Construction and engineering management companies face some daunting IT challenges. Their projects are diverse, so one system typically does not fit all the needs of any given project. Their challenges are compounded because the number of activities CEMs need to carry out intersect with many state, federal and local regulations. Their ERP platforms have been supplemented by physical workarounds, like managers using spreadsheets and other ad hoc means.

Unfortunately, most ERP implementations are too rigid to quickly or effectively adapt to CEMs' dynamic operations in the necessary timeframe. Usually, pockets of a CEM company's business operations have been addressed by the ERP integration. Their data storage has been housed in disparate databases, or more commonly, on excel spreadsheets or even paper. Very little contextual data, the business processes employees perform outside of digitized workflow, has been integrated either. This has hindered ROI and hampered the addition of practical and useful ERP advancements.

Atigro AI-ERP CEM Intelligent Agents

ERP systems are supposed to track and mirror a construction and engineering management company's business operations and requirements. However, for employees across a spectrum of business units, ERPs are often difficult to get answers from because they have very set ways of presenting data. Therefore, getting an answer might require combining data in spreadsheets, looking at records one at a time or having a database administrator research it for them. Additionally, the data reports presented to employees and executives is not provided in a manner that is easy to consume.

Atigro AI-ERP CEM harnesses the power of artificial intelligence to create tailored AI agents that dynamically interact with people and databases throughout ERP workflows. These intelligent AI agents accept requests from employees and access information from databases and other data sources, solve tasks and provide results in an easy to consume manner. This makes it easier for construction management and engineering companies' employees to focus on work activities instead of data entry – increasing employee efficiency, satisfaction and retention.

Atigro AI-ERP CEM's toolkit complies with enterprise security and DevSecOps best-practices, can be integrated with Entra-A or Corporate Google Workspace logins and use multiple enterprise-ready databases. It also can be integrated with custom mobile apps. It also contains an AI-friendly event system which makes it easy to research and understand past transactions in the system. All of Atigro AI-ERP CEM's systems are hosted in a closed environment and do not share information with external services or partners.

Atigro AI-ERP CEM C is available today. It is sold as a platform in conjunction with Atigro's configuration services. Pricing is based on discovery, which begins at $25,000. Interested parties may contact Atigro for additional information.

VFS Global Leverages SAP Software to Power Digital Cross-Border Mobility

SAP SE announced that VFS Global, the world-leading provider of visa, consular and technology services to governments and diplomatic missions, will leverage SAP software to help it develop leading-edge AI-powered digital solutions for cross-border mobility and citizen services.

Cross-border mobility and citizen services are becoming increasingly digital, and governments are looking into the use of innovative technologies such as artificial intelligence to drive efficiency and sovereign security. To accelerate its innovation road map and help governments meet the increasingly complex needs of travelers and citizens, VFS Global is adopting SAP S/4HANA Cloud Public Edition and other SAP solutions.

"We take great pride in partnering with SAP as a leading and trusted technology and AI company," said Zubin Karkaria, founder and CEO of VFS Global. "By combining our deep expertise in visa, consular and citizen services with SAP's world-class solutions, we empower governments to enhance efficiency, strengthen security and enable seamless mobility for millions of travelers around the world."

"With SAP solutions at its core, VFS will be able to leverage the latest innovations to become an even stronger partner for governments, travelers and citizens worldwide," said Christian Klein, CEO of SAP SE.

In line with its vision to embrace technological innovation to support governments and diplomatic missions worldwide, VFS Global has also chosen SAP Business Technology Platform and the SAP Business Data Cloud solution to deliver leading-edge and AI-powered solutions to its customers and to drive operational excellence across its global operations.

"By combining the strengths of VFS Global and SAP, we are elevating cross-border mobility and citizen services to the next level," said Michael Nilles, member of the VFS executive board and chief digital and technology officer. "Strategically, this positions us as a leading force in shaping the future of GovTech and TravelTech, powered by technology and AI innovations that benefit governments, travelers and citizens worldwide," he added.

About SAP

As a global leader in enterprise applications and business AI, SAP stands at the nexus of business and technology. For over 50 years, organizations have trusted SAP to bring out their best by uniting business-critical operations spanning finance, procurement, HR, supply chain, and customer experience. For more information, visit www.sap.com.

Rootstock Wins Gold Stevie® Award in Cloud ERP Category

For a third year, Rootstock Manufacturing ERP receives top distinction from the American Business Awards®

Rootstock Software announced that its Manufacturing Cloud ERP was named the winner of the prestigious *Gold Stevie® Award in the Best Cloud ERP category.* This honor, presented by the American Business Awards®, underscores Rootstock's leadership in delivering a cloud-native, AI-driven ERP tailored to manufacturers.

"Winning Gold three years in a row is a tremendous honor—and a reflection of our team's relentless innovation and focus on customer success," said *Rick Berger*, CEO at Rootstock Software. "In today's volatile market, manufacturers need an ERP solution that provides the control, visibility, and agility to stay ahead. Rootstock

delivers these advantages with cutting-edge *AI agents* and timely innovations like *Tariff Management Central* to help our customers navigate financial and operational risks."

Manufacturers can no longer settle for outdated ERP systems. They require real-time insights, intelligent automation, and future-ready platforms that support growth. Rootstock answers this call with an ERP that provides a connected *Signal Chain* across demand, supply, and capacity, enabling manufacturers to optimize production, simulate sourcing scenarios, and forecast demand with unmatched speed and precision.

"This Gold Stevie Award is also a tribute to the results our customers have achieved," added Berger. "From faster financial cycles to smarter production planning, their *success stories* demonstrate the transformational impact of *Rootstock ERP*—and the trusted partnerships we build with every customer."

The Stevie Award judges echoed these sentiments. One judge said, "Rootstock's ERP stands out for rapid innovation, user-driven features, and AI integration. *Strong analyst validation* and (customer) retention rates reinforce its leadership." Another noted, "Rootstock's financial and transactional enhancements equip finance and operations teams with precise tools to optimize decision-making in complex manufacturing environments."

To learn more, *schedule a demo* or meet Rootstock at one of its *upcoming events.*

About Rootstock

Rootstock Software provides the leading ERP for product companies, empowering manufacturers, wholesalers, and distributors to turbocharge their operations. Natively built on the Salesforce Platform, Rootstock is a modern, future-proof ERP with a fresh user experience. Users appreciate Rootstock's focus on customer success and its AI capabilities that offer a human-first approach. IT teams value Rootstock's platform as it minimizes the need to coordinate complex customizations and third-party integrations. All of these factors add up to delighted customers. As Rootstock continues to grow, stay tuned to hear about its new customers, career opportunities, and LinkedIn posts.

Sage and Amazon Web Services Collaboration Powers AI Innovation in Accounting and Compliance

Domain-specific AI simplifies accounting, automates tasks, and gives SMBs greater financial clarity and confidence

Sage, a leader in accounting, financial, HR, and payroll technology for small and mid-sized businesses (SMBs), today announced significant progress in its ongoing collaboration with Amazon Web Services (AWS). Building on its role as an AWS partner holding the SMB Software Competency, and recognized for its expertise in developing solutions for small and medium-sized businesses, Sage is working with AWS to develop innovative AI solutions ideally suited for the accounting and compliance needs of SMBs.

By leveraging AWS AI services like Amazon Bedrock and purpose-built AI chips like AWS Trainium and AWS Inferentia, Sage has been able to accelerate development, scale innovation, and deliver AI-powered solutions more efficiently. This collaboration enables Sage to rapidly test, refine, and roll out AI models tailored to the complex demands of accounting and compliance so customers can access Sage's solutions faster, gain timely insights, and manage their finances with greater accuracy and efficiency.

Advancing AI in Accounting: Delivering Value to SMBs

With the support of AWS over the past year, Sage has successfully developed and deployed purpose-built Large Language Models (LLMs) and Small Language Models (SLMs) for accounting and compliance. These models improve the accuracy, reliability, and efficiency of Sage's AI-powered financial solutions, enabling SMBs to operate with greater confidence and efficiency. This work also lays the foundations for advanced agentic capabilities within Sage Copilot - Sage's AI powered assistant, supporting more intelligent automation and proactive financial assistance. Sage Copilot is currently available in the UK, US, France, Spain, and Germany, embedded within Sage Accounting, Sage for Accountants, Sage 50 and Sage Intacct.

Key advancements include:

- Enhancing trust with domain-specific AI – The Accounting Filtering Model ensures AI-generated responses remain strictly relevant to financial and compliance-related queries, preventing inaccurate or misleading information.

- Expanding AI-driven financial assistance – These models help enhance Sage Copilot, enabling it to provide real-time insights, automate workflows, and reduce the burden of manual financial tasks.

- Optimizing efficiency through intelligent automation – New endpoint detection models improve AI's ability to interpret user intent and dynamically retrieve relevant financial data, ensuring more precise responses and streamlining financial decision-making.

"Our collaboration with AWS enables us to develop and scale AI solutions that directly address the challenges SMBs face," said Amaya Souarez, EVP, Cloud Services & Operations, Sage. "By combining Sage's deep accounting expertise with the powerful AI infrastructure of AWS, we are creating technology that is not just intelligent, but also trusted and practical for finance. These advancements make financial decision-making smarter, more intuitive, and more efficient, helping SMBs reduce time spent on financial admin, gain greater visibility into their finances, and focus on growing their business."

Unlocking Business Insights with AI-Powered Search

In addition to advancing AI-driven accounting models, Sage is also leveraging AWS technology to transform how SMBs access and interpret financial information. The new Semantic Search API, powered by Amazon Bedrock, enhances the way Sage products retrieve, rank, and generate responses from financial and compliance data, making insights more accessible, relevant, and actionable.

This innovation enables SMBs to:

- Find the right financial information faster – AI-powered search capabilities reduce the time spent navigating financial data, improving productivity and decision-making for users.

- Access up-to-date and relevant insights – A new self-service content hub enables Sage's product teams to continuously refine and manage knowledge sources, ensuring AI-generated responses reflect the latest financial regulations and business trends. This means customers get reliable answers that evolve with their needs and the market.

- Support businesses globally – Semantic search is being expanded to support multiple languages, ensuring that SMBs worldwide benefit from intelligent, AI-driven assistance.

As Sage continues to expand its AI capabilities, it remains committed to responsible AI innovation, developing solutions that are transparent, secure, and designed to meet the specific needs of SMBs.

About Sage

Sage exists to knock down barriers so everyone can thrive, starting with the millions of small- and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to help business flow. By digitizing business processes and relationships with customers, suppliers, employees, banks and governments, our digital network connects SMBs, removing friction and delivering insights. Knocking down barriers also means we use our time, technology, and experience to tackle digital inequality, economic inequality, and the climate crisis. Learn more at www.sage.com/en-us/.

Kinaxis Supercharges BayWa r.e. Solar Trade's Supply Chain with AI-Powered Orchestration

Kinaxis®, a global leader in end-to-end supply chain orchestration, announced that BayWa r.e. Solar Trade, one of the world's largest distributors of photovoltaic components, has implemented its AI-powered orchestration platform Maestro™ to enhance decision-making, improve resilience and scale operations. As global supply chains face increasing disruptions, BayWa r.e. Solar Trade needed a more agile, data-driven solution to maintain efficiency, meet growing demand and adapt to increasing complexities all while ensuring long-term scalability.

BayWa r.e. Solar Trade was looking for a supply chain planning solution that could keep pace with its rapid expansion and growing operational complexity. Traditional Enterprise Resource Planning (ERP) systems couldn't provide the agility required, leading to visibility gaps and slower decision-making. To scale efficiently and stay ahead of disruptions, the company turned to Maestro to accelerate planning, reduce complexity, and improve responsiveness. With Maestro, BayWa r.e. Solar Trade can make faster decisions, mitigate risks, and ensure its supply chain masters volatilities in a fast-changing market environment.

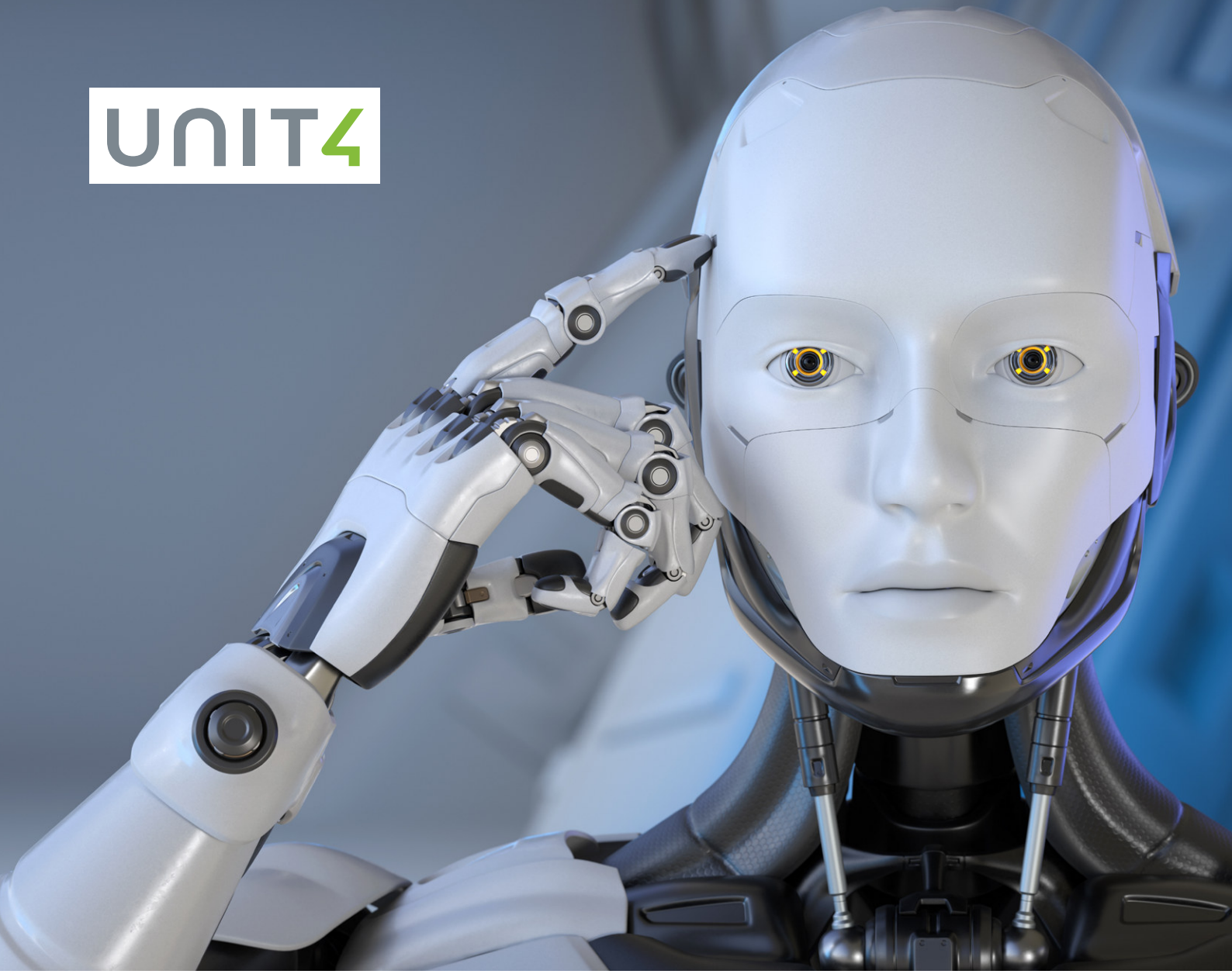
"BayWa r.e. Solar Trade is embracing Maestro's advanced planning functionality and supply chain orchestration to enhance agility, close visibility gaps, and drive smarter, faster decision-making for its operations," said Dominik Dohr, Global Head of Supply Chain and Operations at BayWa r.e. Solar Trade. "Maestro gives us real-time insights, automation, and flexibility, allowing us to adapt quickly to market changes and respond to supply chain events efficiently. With Kinaxis, we can strengthen our operations today while ensuring we have the right foundation for a sustainable future."

"BayWa r.e. Solar Trade is reinforcing its commitment to innovation by leveraging AI-powered supply chain orchestration to enhance agility, drive smarter decisions, and create long-term value for its business," said Fabienne Cetre, executive vice president of EMEA sales at Kinaxis. "With Maestro, they gain the intelligence to anticipate disruptions and adapt to market dynamics efficiently. We're excited to support BayWa r.e. Solar Trade in setting a new benchmark for supply chain orchestration."

For more information about Kinaxis and its cutting-edge supply chain orchestration solutions, please visit *kinaxis.com.*

About Kinaxis

Kinaxis is a global leader in modern supply chain orchestration, powering complex global supply chains and supporting the people who manage them, in service of humanity. Our powerful, AI-infused supply chain orchestration platform, Maestro™, combines proprietary technologies and techniques that provide full transparency and agility across the entire supply chain — from multi-year strategic planning to last-mile delivery. We are trusted by renowned global brands to provide the agility and predictability needed to navigate today's volatility and disruption. For more news and information, please visit kinaxis.com or follow us on LinkedIn.



Unit4 Launches Ava: the AI Agent for Self-Driving ERP

Advanced Virtual Agent (Ava) is a milestone in journey to automate 50% of ERP tasks

Unit4, a leader in enterprise cloud applications for people-centric organisations, launched Advanced Virtual Agent (Ava), a proactive conversational agent that will act as a centralised artificial intelligence (AI) interface, orchestrating and automating ERP workflows. Designed as an intelligent work companion seamlessly integrated with Unit4 ERPx and Microsoft Teams, Ava enables effortless collaboration and provides personalised recommendations as well as instant, contextual assistance. Ava builds on Unit4's decade of innovation in digital assistants and is a key milestone in the company's vision to deliver self-driving ERP.

In line with Unit4's pragmatic approach to AI, Ava will reshape workflows into more intelligent, adaptive, and user-centric experiences. It will empower people by enabling them to focus on tasks only humans can do, as well as boosting productivity with less effort. Unlike other agentic AI approaches, Ava acts as the single, central access point to ERPx, providing unified assistance to foster consistency and clarity for users. Ultimately, it supports organisations in maintaining the single source of truth for business-critical information.

"It is clear AI is going to dramatically change how users interact with ERP systems, as it will enable people to focus on more meaningful and rewarding work," said Claus Jepsen, Chief Technology Officer, Unit4. "Ava isn't just smart – it's pragmatic, purposeful and deeply attuned to the real challenges people face. That's why we have built Ava as one interface and agent, as this will create an integrated platform making it easier to add functionality and avoid siloed AI Agents."

As *Unit4 revealed last year in research commissioned from IDC*, AI adoption is rapidly moving through three phases. It is already being used as an agent and Ava fulfils a variety of functions including task management, contextual help and data searches. The second phase in the maturing of AI technology sees it acting as an advisor which Ava does in areas such as anomaly detection in payroll and providing suggestions for invoice approval as well as project creation. Ultimately, Ava will act autonomously as an agent to:

- Centralise orchestration by integrating and co-ordinating workflows within ERPx and Microsoft Teams
- Deliver intelligent automation where routine tasks are autonomously managed to reduce manual workloads
- Enhance augmentation with actionable insights and personalised recommendations to augment specialised tasks
- Offer pro-active and predictive capabilities to identify issues, predict needs and dynamically adapt workflows to achieve business objectives efficiently

Initially, Unit4 is integrating Ava with Microsoft Teams as it is so widely used by its customers, but the roadmap will see integrations with other collaboration tools added in the future. Ava understands natural language conversations in Microsoft Teams and translates them into specific tasks to be completed in ERP workflows. This is possible, because Ava is built on Unit4's microservices, Cloud native architecture which provides the interoperability and extensibility necessary for Ava to act as an interface to Unit4 ERPx. As a result, Unit4 can build out AI capabilities and connect them into Ava via open APIs giving the agent the ability to adapt quickly as AI functionality evolves.

"The journey into the digital world is neither stale nor stagnant—AI has brought a greater urgency to modernise and transform quickly. IDC finds that 47% of organisations are creating an AI-ready workforce that uses AI assistants, advisors, and agents to boost business success. With AI coming to the forefront, organisations must understand where their journey is headed and the various pathways to success," said Mickey North Rizza, group vice president, Enterprise Software at IDC. " The journey is multidimensional, but the promise of a new digitally savvy enterprise is at the heart of modernisation and transformation."

UNIT4

About Unit4

Unit4's next-generation enterprise resource planning (ERP) solutions power many of the world's mid-market organizations, bringing together the capabilities of Financials, Procurement, Project Management, HR, and FP&A to share real-time information, and deliver greater insights to help organizations become more effective. By combining our mid-market expertise with a relentless focus on people, we've built flexible solutions to meet customers' unique and changing needs. Unit4 serves more than 5,100 customers globally across a number of sectors including professional services, nonprofit and public sector, with customers including Southampton City Council, Metro Vancouver, Buro Happold, Devoteam, Save the Children International, Global Green Growth Institute and Oxfam America. For further information visit www.unit4.com.

SAP Cloud Migrations Drive Demand for Ecosystem Services

Companies seek partners with industry expertise, AI tools to help them manage the cost and risks of migration, ISG Provider Lens™ report says

Enterprises around the world are cautiously migrating from SAP ERP to SAP S/4HANA and working with service providers to navigate the financial and operational complexities involved, according to a new research report published today by Information Services Group (*ISG*) (Nasdaq: *III*), a global AI-centered technology research and advisory firm.

The 2025 ISG Provider Lens™ global SAP Ecosystem report finds that many companies have difficulty understanding the total cost of SAP migration and building a strong business case for moving to cloud-based S/4HANA. Though under pressure to act, due to the pending end of support for SAP ERP Central Component (ECC) in 2027, they are moving carefully to maintain business continuity and minimize the impact of the transition.

"Moving core ERP functions to the cloud is such a daunting task for enterprises that many question whether it is worth the effort and investment," said Bill Huber, ISG partner, digital platforms and solutions. "They look to SAP's diverse ecosystem of providers for migration strategies that answer their specific business and technical challenges."

Two major SAP cloud migration offerings, RISE with SAP and GROW with SAP, are gaining traction with different types of organizations, the report says. Both are designed to help enterprises streamline business operations and become more agile, and service providers play key roles in implementing both.

RISE with SAP offers a holistic transformation approach aimed at enterprises starting to move to the cloud. Adoption is growing more slowly than expected, but companies are beginning to understand the components of the package so they can make more informed decisions about using it, ISG says. Service providers that understand specific industries are developing tailored migration plans for quicker deployment and faster time to market. Companies considering RISE with SAP seek providers that can deliver effective communication and comprehensive support frameworks

GROW with SAP, designed as a scalable, accelerated path to cloud adoption, is gaining significant momentum among fast-growing small and lower midmarket companies and subsidiaries, ISG says. The package, which enables the adoption of SAP best practices with minimal customizations, is designed to allow a quick return on investment. Providers are supporting GROW with SAP with prebuilt templates and accelerators.

As companies move SAP workloads to the cloud, they are increasingly focused on cost optimization, the report says. Many are turning to providers for FinOps practices to control cloud spending and maximize return on investment. Companies seek to measure the cost of individual business transactions and processes in the cloud, making AI an increasingly important analytical tool.

A growing number of enterprises are using SAP Business Technology Platform (BTP) to take a Clean Core approach to SAP implementations for easier upgrades and better performance, ISG says. Service providers are building industry-specific solutions on top of BTP to help clients integrate digital processes and accelerate innovation. SAP Business AI, including the Joule generative AI copilot, is also gaining momentum, though some enterprises still want more clarity about its pricing, the report says.

"Joule has many potential use cases across industries and departments to improve insights and decision-making," said Jan Erik Aase, partner and global leader, ISG Provider Lens Research. "Enterprises are working with providers to get maximum business value from it."

The report also explores other trends affecting enterprises using SAP, including rising concerns about compliance and security and the need for change management.

For more insights into the SAP-related challenges facing enterprises worldwide, along with ISG's advice for addressing them, see the ISG Provider Lens™ Focal Points briefing *here.*

The 2025 ISG Provider Lens™ global SAP Ecosystem report evaluates the capabilities of 45 providers across four quadrants: RISE with SAP Implementation Partners, SAP Business AI and Business Technology Platform (BTP) Services, Cloud Economics and FinOps Services for SAP and GROW with SAP Implementation Partners (Midsize providers).

The report names Accenture, Capgemini, HCLTech, IBM, Infosys and Wipro as Leaders in three quadrants each. It names Cognizant, LTIMindtree, TCS and Tech Mahindra as Leaders in two quadrants each. Atos, Cognitus, Deloitte, Globant, KaarTech, Stefanini, Syntax and YASH Technologies are named as Leaders in one quadrant each.

In addition, Cognitus, Delaware and DXC Technology are named as Rising Stars — companies with a "promising portfolio" and "high future potential" by ISG's definition — in one quadrant each.

In the area of customer experience, Wipro is named the global ISG CX Star Performer for 2025 among SAP ecosystem providers. Wipro earned the highest customer satisfaction scores in ISG's Voice of the Customer survey, part of the *ISG Star of Excellence™ program*, the premier quality recognition for the technology and business services industry.

Customized versions of the report are available from *Atos* and *Cognitus.*

The 2025 ISG Provider Lens™ global SAP Ecosystem report is available to subscribers or for one-time purchase on this *webpage.*

About SAP

As a global leader in enterprise applications and business AI, SAP stands at the nexus of business and technology. For over 50 years, organizations have trusted SAP to bring out their best by uniting business-critical operations spanning finance, procurement, HR, supply chain, and customer experience. For more information, visit www.sap.com.

Capgemini Unveils Industry-First Perpetual 'Know-Your-Customer' Sandbox to Enable Real-Time Continuous Compliance for Financial Institutions

New modular technical architecture provides a testing environment that empowers firms to innovate safely and scale their journey to pKYC with confidence

Capgemini announced the rollout of a technology sandbox that offers financial institutions a sound framework to migrate from legacy, static Know-Your-Customer (KYC) processes and labor-intensive periodic reviews towards perpetual KYC (pKYC) and event-based reviews. A first of its kind, Capgemini has collaborated with multiple technology partners to orchestrate the integration of this architecture. The sandbox offers a safe and secure test environment for firms to visualize how they can transition to a pKYC process and demonstrate its effectiveness to senior management and regulators. Capgemini's enhanced portfolio of offerings in financial crime, risk management and regulatory compliance services, along with the *news of its recent acquisition of Delta Capita BV*, further strengthen the Group's position as partner of choice for Financial Crime Compliance (FCC) solutions.

Perpetual KYC provides an auditable, data-led and dynamic approach to alert firms automatically to material changes in a customer's circumstances that could affect their risk profile. This enables a financial institution to re-assess its corresponding risk exposure to the customer, better achieving a state of continuous, real-time anti-money laundering (AML) compliance.

Meeting regulatory requirements is key to success in the financial services industry and requires the consolidation of data across internal systems and external sources. The novel sandbox model, developed by Capgemini, enables firms to test, refine, and scale best-in-class software in a controlled environment, ensuring a seamless transition while mitigating risks. Engineered to be flexible and modular in design, organizations can easily implement the sandbox across their respective cloud platforms and technologies of choice.

"Static KYC processes present opportunities for financial criminals to exploit gaps and weaknesses for money laundering and other fraudulent activities, creating a continuous risk factor for financial institutions. We firmly believe that perpetual KYC is the approach needed to protect financial institutions from undue risk, enforcement actions, and large fines," said Manish Chopra, Global Head of Risk and Financial Crime Compliance at Capgemini. "The pKYC sandbox capability marks a significant advance for industry compliance, meeting regulators' growing expectations of responsible innovation. It is an actionable measure for financial institutions to demonstrate how they are mitigating inherent risk exposure more effectively."

"Financial institutions have a duty to not only understand their customer, but their customer's customer too," saidIvar Lammers, Global Head of Financial Crime Prevention for Wholesale Banking at ING. "As financial crime rapidly evolves, and pressure mounts on maintaining compliance, the traditional KYC models struggle to address real-world challenges. Perpetual KYC is the shift required to rapidly respond to customer behavior changes and drive smarter compliance. Capgemini's pKYC sandbox is an impressive blend of visualizing the effectiveness of KYC processes in action and experimenting with new tools in a secure environment, all without risking customer data and optimizing infrastructure cost. It presents a significant opportunity for the industry to demonstrate to regulators excellence in achieving the critical requirements of real-time KYC."

Key benefits of Capgemini's new pKYC sandbox include:

- ***A safe testing environment:*** a secure environment where new KYC processes, policies, or technologies can be tested without risking real customer data leakage or compliance failures.
- ***Best-of-breed solutions:*** integration of key components from best-of-breed RegTech solutions and accelerators.
- ***Real-time visualization:*** ability to visualize pKYC in action to gauge benefits and showcase the framework to regulators.
- ***Quantifiable business impact:*** rapid end-to-end testing of the tech stack and processes leading to much faster feasibility of the pKYC operating model and creation of the associated business case.
- ***Operational readiness:*** identifies operational bottlenecks and optimizes workflows to enable full-scale deployment with confidence.

"In response to industry challenges around manual KYC processes and operational spikes, Capgemini has developed a pKYC sandbox that offers agile testing and rapid time-to-value," says Dheeraj Maken, Practice Director, Everest Group. "The solution integrates real-time data orchestration, AI-led automation, and scalable cloud infrastructure to drive process efficiencies while aligning with regulatory expectations for proactive, real-time responses – accelerating the industry shift toward perpetual KYC. This approach – backed by strategic partnerships, targeted investments, and geographic expansion – demonstrates Capgemini's commitment to innovation in the FCC space."

Partner of choice for FCC solutions

The new sandbox is now part of Capgemini's deep portfolio of offerings across financial crime, risk management and regulatory compliance services. It follows the recent acquisition of Delta Capita BV, a leading European provider of Financial Crime Compliance (FCC) solutions. Delta Capita comprises a strong consulting team focusing on KYC transformation. These developments further strengthen Capgemini's position as partner of choice for FCC solutions. Delta Capita BV was Capgemini's second major FCC acquisition, after the Group acquired and successfully integrated the FCC division of Exiger in 2023.

To learn more about Capgemini's unique sandbox, visit: *Perpetual KYC Catalyst by Capgemini*

About Capgemini

Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, generative AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2024 global revenues of €22.1 billion.

Complex Infrastructure Contractor Abergeldie Targets Operational Savings Worth 187,000 AUD a Month with IFS Success Services

Advanced use of IFS Lobby dashboards, automated management of construction project securities, and expert resource to accelerate a move to IFS Cloud are just some of the benefits seen by Abergeldie since subscribing to IFS Success Services.

Designing and constructing complex civil engineering projects, Abergeldie's wide-ranging capabilities include Tunnelling, Bridge Construction, Dam Construction, Waste-Water Facility Construction, Rail Civil Works, Marine Works, Ventilation Shaft Design and Construction, Conveyor Installation, Water Process Treatment, Aeration and Dewatering Equipment, and Civil Mine Works.

In 2018, the company selected IFS as its new Enterprise Resource Planning solution. By 2021, with the implementation live and a need to service a rapidly growing volume of civil projects across the business, the company turned to IFS Customer Success Services for direct, on-demand access to IT consulting and support resource. Explains David Wood, Abergeldie's Chief Financial Officer, "We only have a small internal IT team of one or two managing day-to-day support company-wide. IFS Success tickets mean we can quickly escalate issues or fast-track projects that are strategically important to the business using IFS experts. We've been successfully using the services for over a year now," he says.

IFS Success Services: IFS resource on-demand

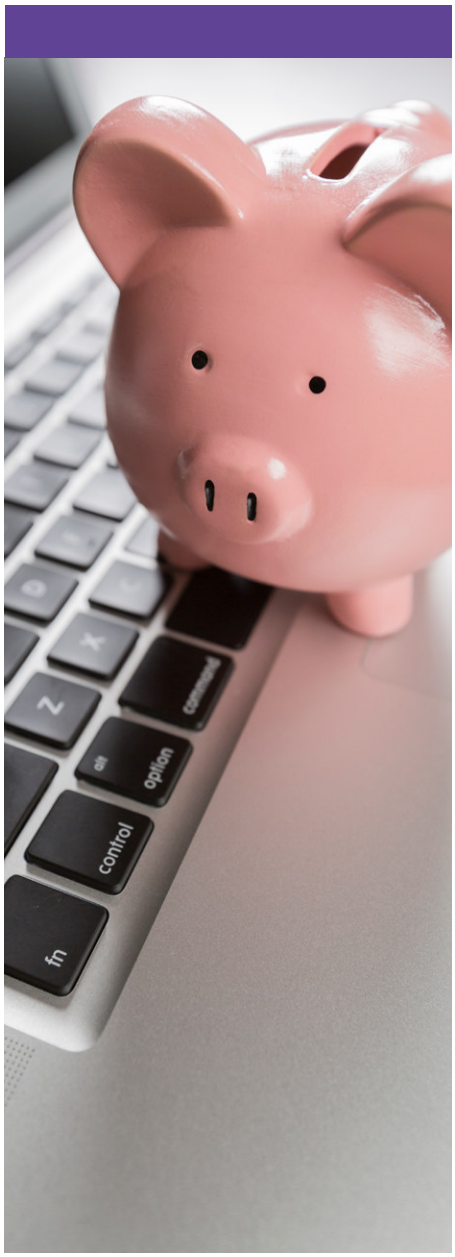
The IFS Customer Success engagement framework is designed to ensure customers can make the most of the software they have bought. Working closely in partnership, an IFS Customer Service Manager (CSM) works developing and manages a business plan that reflects the corporate and strategic needs of the business. "More or less every other week we've got somebody from IFS in the office, on the telephone or in contact," says Wood.

Subscription-based, Customer Success Plans are run over a three or five-year lifecycle. Becoming fully immersed in the challenges faced by the business and the sector, Customer Service Managers become advocates, planning and managing resources such as Expert Services, Solution Architects and Software Engineers to deliver agreed service outcomes.

The engagement model provides a fixed number of resource 'Service Units' (SUNS) with IFS per year for a fixed quarterly billing. When strategic projects, operational issues or routine technical requests arise, they can be swiftly and effectively dealt with by IFS experts that understand both the specific commercial environment and the business application. The scalable approach allows customers to augment existing internal resources and competencies, or free-up staff to focus on adding value to other areas of the business. Subscribers can access first-line team IFS helpdesk response within 2 hrs. If needed, an operational fix can be delivered within 2 business days, or a new IFS report or IFS Lobby built within the next business week.

Executing at pace

For Abergeldie, the service has provided both operational and strategic benefits. "Project Management is obviously a key capability area for us, and we can both benefit from advice to ensure we are getting maximum value from our IFS solution, whilst executing business-critical projects at pace," says Wood. "For example, we are currently introducing e-forms into the business, and IFS Success is helping to drive that through. Since we are currently on IFS Apps 10, the service is also providing consulting expertise as we start to make plans for our future migration to IFS Cloud," he says.



Identifying business value

Part of the IFS engagement activity, both pre-and post-implementation, has been Business Value Assessment. Says Wood, "Analysis of our Project Reporting processes revealed that double handling of data was costing our Australian operations around 187,000 AUD a month. A pilot project is now in progress to redesign our processes alongside the IFS solution. The team estimates, over the lifetime of the IFS solution contract, the savings will be in the order of 12-14 million AUD."

Whilst work is still ongoing to refine internal processes, the 'notify me' feature within the Aurena IFS mobile app has already proved popular. "For example, staff no longer have to log into IFS on a desktop to authorize a PO, they can simply reach for their smartphone," says Wood.

Legacy modification consequences

Wood joined Abergeldie in 2021, after the initial IFS implementation. He offers an insightful perspective on the dangers of legacy modifications and customizing ERP solutions. "Whilst the implementation for Abergeldie has relatively few modifications, a decision made back in 2019 to modify code to accommodate specific time reporting needs has resulted in some unexpected consequences," he observes.

"It has impeded some other manual processes and meant we will have to take more time and thought to go evergreen on IFS Cloud, which, after attending the IFS Unleashed conference in Miami last year, we are very keen to embrace. Wherever possible, keep any ERP system core standard by using non-invasive configuration," he advises.

> "IFS Success Services not only provide us with independent advice. They also ultimately ensure all our staff have peace-of-mind."
>
> -David Wood,
> Chief Financial Officer
> Abergeldie Complex Infrastructure

Training and adoption

Wood is mindful of the importance of internal control of Learning and Development (L & D) to ensure quality on-the-job training for the system to succeed. "In a large organization, there's typically free L&D resource to monitor and control training after handover. But for smaller, very busy companies like us, it's much more of a challenge. We're actively pushing to increase our daily active user base, encouraging staff to complete administration on-the-fly rather than just logging in at the month-end to complete timesheets, for instance," he says.

First-time ERP implementation advice

What advice would Woods offer another smaller company like Abergeldie who is embarking on an enterprise-wide ERP solution for the first time? "I would say definitely make sure you fully understand and can clearly define your processes at the outset," says Wood. "Also, don't rush. Everything doesn't have to be in place in one go. Far better to progress in stages, with data successfully permeating its way through the business, one department at a time. Remember too, when a business is very busy growing, implementation cannot become a full-time job. Be patient and dedicate the time and resource that's available to get it right first time," he advises.

IFS Success and the Moment of Service™

When it comes to improving Abergeldie's Moment of Service, Wood is confident that automation and efficiencies in IFS will allow staff to spend more time listening to customers and be more proactive. "We use Lobbies dashboards in IFS extensively, and they are a powerful tool for us. We develop new Lobbies ourselves and use the IFS Success team for more complex requirements," says Wood.

The Success Service has also helped to streamline the Performance and Attention Security Abergeldie must provide each client at the start of a construction project. Explains Wood, "Before I used IFS, every ERP I've come across has struggled with this. But the IFS Success team has been able to help us manage and track these securities using various modules in the business. We're currently now refining a live lobby to show us where the securities are, in what division, for which project, and for how much. Now, more or less every other week, we've got somebody from IFS in the office or on the telephone or in contact taking our projects forward." he says.

Benefits achieved with IFS

- Accelerated development of Lobbies and business functions for Aurena
- Consultants familiar with both the business and wider sector best practice
- Rapid escalation of competency queries
- Immediate expertise on demand
- Increased agility with scalable capabilities
- Resource to pursue efficiencies creating significant operational savings
- Resource to prepare for migration to evergreen IFS Cloud

About Abergeldie Complex Infrastructure

Founded in 1994, Abergeldie Complex Infrastructure is a civil engineering contractor delivering projects in the infrastructure, rail and transport, utilities and energy sectors in Australia and New Zealand. Headquartered in Sydney, New South Wales, and with offices in Newcastle, Brisbane, Melbourne, Canberra and Auckland, the company employs 658 staff with revenues of 545m AUD. *www.abergeldie.com*

Lyft Cuts Financial Close in Half With Oracle Cloud

Lyft uses Oracle Cloud applications to build a single source of information across finance and operations—and gets data to stakeholders faster.

Partner Deloitte brought a subject matter expert into Lyft for each key business process module—such as procurement, accounts payable, and accounts receivable—to help Lyft get the most value from each one.

Deloitte.

Lyft and Deloitte teamed to deliver a solution that is built to help the enterprise evolve and stay ready to navigate disruption. Learn how Deloitte can help your organization make impact that matters.

> "The world's going a thousand miles an hour, so for me to say, 'Wait, I need another week' just doesn't work anymore. Oracle is reimagining the financial systems footprint. It's a true transformation at Lyft with the products we're implementing."
>
> -Lisa Blackwood-Kapral, Chief Accounting Officer, Lyft

Business challenges

Lyft, the transportation network, was busy reimagining the future of transportation. Behind the scenes, though, the company had gone from a high-growth startup to a publicly traded enterprise processing billions of transactions a year—and its finance systems hadn't kept up.

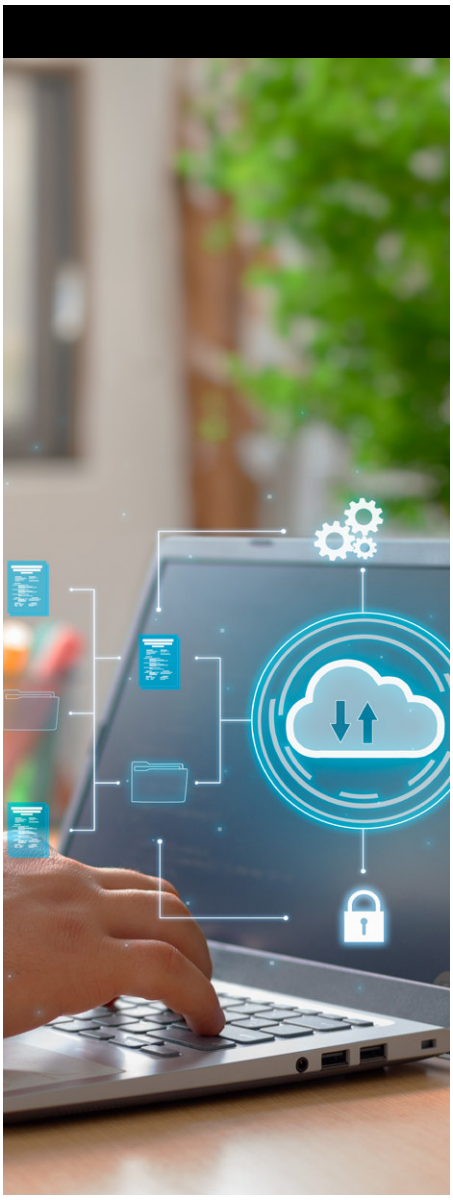
In all, it was running about 30 such systems, which were siloed, costly to maintain, and inefficient. They didn't provide the timely information a fast-growing business needs to make decisions.

Lyft wanted one place to look for answers—across finance and operations, on one data model—so that analysts could get clear reporting and dig for information using the latest analytics and visualization tools.

> "When I have a process running in the middle of the night, I can't tell you the exact minute it's going to stop. With the autoscaler in Oracle Autonomous Data Warehouse, it scales the number of CPUs automatically, so I don't have to pay for idle hours. That's very attractive to my finance team."
>
> -Jay Weiland, Director of Financial Solutions, Lyft

Why Lyft Chose Oracle

Lyft turned to Oracle for its integrated *Oracle Fusion Cloud finance*, *enterprise performance management*, *procurement*, and *risk management applications*. It also implemented *Oracle Autonomous Database* and *Oracle Analytics Cloud*, running on *Oracle Cloud Infrastructure*.



For Lyft's finance team, closing the financial books faster isn't just an accounting timesaver, but also a means to grow faster by democratizing access to data. "When I get data fast and get it into the hands of my stakeholders, they can really run with business decisions to grow the company, which is our ultimate goal and our North Star," says Lisa Blackwood-Kapral, Lyft's chief accounting officer.

The Oracle Cloud applications' built-in business best practices let Lyft implement them with no customizations, helping the company improve existing processes rather than just automate them. "A successful implementation to me is finding what you could do differently to get the data faster, as opposed to doing it the way you do today," Blackwood-Kapral says.

Oracle also offered capabilities to help Lyft expand internationally, such as multicurrency, multilingual application services. Having finance, operations, and analytics on one system will ensure that everyone at Lyft knows where to turn for information and insights.

Results

When Lyft implemented the first elements of *Oracle Fusion Accounting Hub* in four months, it was able to cut—by more than half—the time it takes to close its books on the revenue component of the ledger. Once the company fully implements *Oracle Fusion Cloud ERP*, it expects to cut the time for its full financial close in half, and then in half again after that as it continues to improve its processes.

About Oracle NetSuite

For more than 25 years, Oracle NetSuite has helped organizations grow, scale, and adapt to change. NetSuite provides an integrated system that includes financials / Enterprise Resource Planning (ERP), inventory management, HR, professional services automation and omnichannel commerce, used by more than 37,000 customers in 219 countries and dependent territories.

ORACLE
NETSUITE

Resonac: Getting a Powerful Chemical Reaction From a Company Culture Transformation That's a Catalyst For Employee Empowerment

INDUSTRY	REGION	COMPANY SIZE
Chemicals	Tokyo, Japan	23,840 employees

RESONAC

Resonac finds the key to developing cocreative talent

With an ambitious vision to change society through the power of chemistry and change the way Japanese companies are managed, Resonac Holdings Corporation transformed itself using SAP SuccessFactors solutions. By prioritizing recruitment, learning, performance management, and development, the company is providing a safe way for its risk-averse people to push themselves beyond traditional boundaries.

7%
Year-on-year rise in staff having meaningful career discussions.

93.8%
Global mandatory positions filled.

90
Evergreen long-and short-term talent pools created.

> "Transforming our people and corporate culture is the key to maximizing our corporate value. Resonac will change society and the ways of Japanese corporate management."
>
> -Hidehito Takahashi,
> President and CEO,
> Resonac Holdings Corporation

Mixing people, not chemicals, to inspire individual abilities

Established through the integration of Showa Denko K.K. and Showa Denko Materials Co. Ltd., Resonac Holdings Corporation has a bold vision to change society through the power of chemistry. The organization is recognized for its extensive lineup of global market-leading semiconductor materials that are the critical components for AI. The integration of the two companies allowed Resonac to move material design and development in-house.

Aiming to compete on the world stage as a world-class functional chemical company, Resonac wants to be a company that contributes to the sustainable development of society through innovation and the capability to develop new businesses. It also aims to be a company that attracts the attention of other corporations by developing the best cocreative talent for the future of Japan's manufacturing industry.

Staking its place as an essential supplier in the semiconductor sector called for transformation and creating new ways of working. This included firmly breaking away from the management practices associated with traditional Japanese manufacturing companies, namely: slowness, inflexibility, and employee progression based on seniority.

Resonac believed that not transforming meant getting left behind in the AI revolution. Driven by a desire to urgently move away from the past, it sought to embrace a future where employees are encouraged to take risks and push themselves beyond traditional boundaries. The company put HR at the helm to cultivate this new corporate culture.

> "In typical Japanese manufacturing companies, people are relatively conservative when it comes to change. We needed to work out how to make our people feel comfortable with change and take advantage of acting more openly and going the extra mile to realize their true potential. We also needed quick wins in terms of tangible benefits for employees and managers."
>
> -Koji Date,
> Special Mission Professional reporting to the Chief Human Resources Office, Resonac Holdings Corporation

Instilling corporate values as a catalyst for change

For Resonac to change society through the power of chemistry, it was critical to unleash its employees' potential by providing a safe place for its people to try new things. Based on its new approach, the organization wanted to empower its employees to bring the company's values to life through their own behaviors.

Firm in the belief that corporate value will be generated by the business strategy that's underpinned by people power and culture, Resonac invested in SAP SuccessFactors solutions as the backbone of its talent management agenda. The company followed an implementation plan that moved at a speed appropriate for its people's sensitivities, led by an HR team strongly attuned to the risk-averse and change-resistant nature of its employees.

With the impetus on enabling its workforce to manage their own career paths, make data-driven decisions, and collaborate more effectively across the organization, Resonac prioritized key areas of talent attraction and career development. For recruitment, learning, and performance management, it implemented the *SAP SuccessFactors Recruiting*, *SAP SuccessFactors Learning*, and *SAP SuccessFactors Performance & Goals* solutions.

To encourage employees to push themselves beyond traditional boundaries, Resonac adopted the *SAP SuccessFactors Succession & Development* solution, aligning talent development to achieve the company's goals. This dynamic solution allows the company to engage its people with meaningful career development opportunities,

nurture leaders, and close talent gaps. Using tools for employee development planning and succession planning, Resonac can cultivate its next generation of talent and place the right people in the right roles.

The organization is also in the process of implementing the *SAP SuccessFactors Employee Central* solution to create a single real-time repository of trustworthy human capital information. In parallel, it will roll out self-service functionality for managers and employees to encourage autonomy through empowerment.

And to capture employee sentiment, Resonac adopted the *SAP Employee Engagement solution by Qualtrics.*

> "Through our HR practices with SAP SuccessFactors solutions, we encourage our people to act more openly and go the extra mile to realize their potential."
>
> -Koji Date,
> Special Mission Professional reporting to the Chief Human Resources Office, Resonac Holdings Corporation

Heightening engagement by allowing its people's abilities to thrive

True to its CEO's bold vision of changing society through the power of chemistry and changing the way Japanese companies are managed, Resonac is transforming itself and has seen significant change since adopting SAP SuccessFactors.

At the heart of this transformation is a new partnership between management, HR, and its people where HR is the business enabler, and managers are responsible for their team members' growth. Its implementation approach to prioritize recruitment, learning, performance management, and succession and development provided a safe way for its risk-averse people to try new things, take chances, develop themselves, and have quality career discussions with their managers.

Through its lens of maximizing corporate value, the organization has successfully reviewed 1,367 mandatory and 1,511 nonmandatory positions. Of its mandatory positions, 93.8% are filled. And in terms of establishing evergreen talent pools, the company has created short-term and long-term talent pools to help it find and attract the right candidates, at scale and with speed.

Surveys captured by SAP Employee Engagement regarding employees' attitudes toward career development opportunities and the potential for fulfilling career goals are showing a positive momentum. This includes a seven-point upswing in employees reporting meaningful discussions with managers on career development opportunities. Resonac has also seen success in creating increasingly robust succession plans. These changes help the company retain top talent.

Koji Date, special mission professional reporting to the chief human resources office at Resonac, elaborates on how the change in succession planning has been a success for the organization. "In the past, succession plans developed by our legacy companies were orchestrated at the very senior management level without seeking broader views, which could lead to biased decision-making. Now, we offer highly transparent talent information, which gives the management team more confidence that they're making sound succession planning decisions. That is a significant change, and the management team has a tangible benefit."

"Cocreation is the driving force of our new organization. We encourage our people to move beyond borderlines, to challenge themselves, and to harness their collective strength to create a culture where every idea and every contribution matters."

-Koji Date,
Special Mission Professional reporting to the Chief Human Resources Office, Resonac Holdings Corporation

Bolstering opportunities for cocreative innovation

At a time when not transforming would have caused Resonac to be left behind, the company is now in a commendable position to take its place in history as a key player in the AI revolution. Supported by SAP SuccessFactors solutions, it is developing autonomous, cocreative talent that embodies its purpose and values.

Resonac is currently in the process of rolling out the SAP SuccessFactors Compensation solution to automate and help simplify employee compensation planning, as well as the SAP Analytics Cloud solution to elevate business intelligence capabilities and analytics.

Looking ahead, Resonac's key priority is completing the implementation of SAP SuccessFactors Employee Central. Once the company has a single, trusted talent information system, HR can expand its capability to support managers in effectively managing their employees and leading compensation and career development discussions without direct involvement of the HR team.

About SAP

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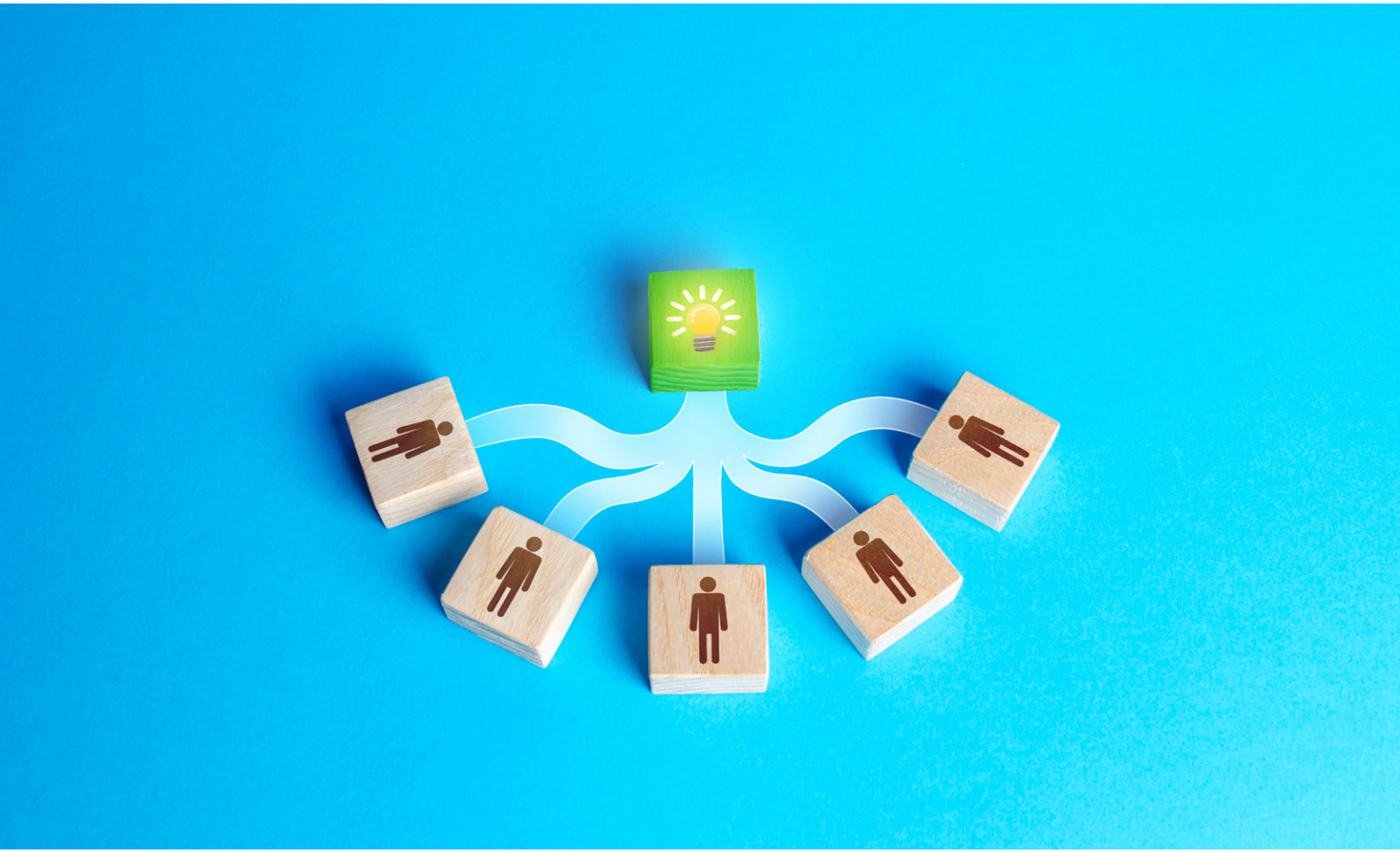

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