

Laying the Path for a Successful ERP Journey

Each institution’s ERP journey will have its own path, its own twists and turns, and its memorable moments!

Recent EDUCAUSE research illuminated the challenges and success factors essential to achieve a robust ERP implementation with rich adoption. The 2023 research study provides valuable insights for every institution. Whether you’re optimizing your current ERP or starting the journey to a new solution, you’ll find insights for all your enterprise projects, including student information system (SIS), finance, human capital management (HCM), customer relationship management (CRM), or advancement solutions. Create a path for your institution’s success by addressing:

- People and organizational readiness
- Executive leadership engagement
- Thorough preparation



Enterprise Resource Planning (ERP) definition — Noun

1. Any or all combinations of financial, human resources (HR)/human capital management (HCM), and student information systems (SIS)
2. Large, expensive, complex systems that take multiple years to implement with the promise and potential of modernization, process reengineering, campus evolution, student success, ongoing innovation, and true transformation.

Survey respondents identified their ERP status as:

19% Recently Completed

17% Currently Implementing

12% Committed to Replace

24% Interested to Replace

ERP Preparation Checklist/Journey Path to Success

*Note: These are not in a prescribed order, and many can be done concurrently.
Each of these activities was notably ranked by all survey respondents.*



ERP Lessons Learned

Completed and Implementing respondents say “We wish we had...”

- Redesigned future system processes
- Invested in change management
- Secured sustained top-level executive support
- Assessed staff backfill
- A strong project management office
- Assessed analytics and reporting needs
- Conducted policy reviews and redesigned processes
- Discussed up-front expectations
- Spent more time on training and skill development
- Assessed third-party system integrations
- Communicated early and widely

ERP Implementation Risks — Why Do Projects:

Go over budget



- Unplanned consultants to address internal resource/knowledge gaps
- Unplanned customizations required
- Staff turnover and training costs
- Change in leadership
- Changing vendors or implementation partners mid-project
- Unrealistic timelines
- External events (e.g., COVID, social and political disruption)

Get delayed



- Issues with change management
- Staff/stakeholders not feeling ready or comfortable with new systems
- Underestimated complexity of customizations
- Changing vendors or implementation partners mid-project
- Changing requirements
- External events (e.g., COVID, social and political disruption)
- Incomplete business process knowledge

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