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

Each of these activities was notably ranked by all survey respondents.

- Conduct functional needs assessment
- Secure executive leadership support
- Review current system needs
- Establish project vision and goals
- Clean legacy data
- Establish a change management plan
- Assess third-party integrations
- Secure comprehensive project budget
- Establish project staff needs
- Secure project management
- Identify institutional culture and readiness for change
- Review technical infrastructure
- #1 anticipated challenge for those interested in a new ERP
- Assess staff backfill
- #1 anticipated challenge for those implementing
- Conduct policy review
- Establish communication plans
- #1 anticipated needed skill for those implementing a new ERP
- Conduct a comprehensive and thorough evaluation and selection process
- Assess project staffing needs
- #2 anticipated challenge for those committed and interested
- Assess project needs
- Conduct staff backfill plan
- #2 anticipated challenge for those interested in a new ERP
- Assess reporting needs
- #1 preparation for those implementing ERP
- Assess technical infrastructure
- #1 anticipated challenge for those interested in a new ERP
- Assess technical needs
- #1 anticipated challenge for those implementing
- Assess third-party integrations
- #2 planned activity for those committed and interested
- Assess project needs
- Establish third-party integrations
- #1 planned activity for those implementing
- Assess customizations
- #2 planned activity for those committed and interested
- Conduct customizations
- Secure customizations
- Conduct functional needs assessment
- Conduct technical needs assessment
- Secure comprehensive project budget
- Review current system needs
- Establish project vision and goals
- Establish a change management plan
- Clean legacy data
- Establish project staff needs
- Secure project management
- Identify institutional culture and readiness for change
- Review technical infrastructure
- #1 anticipated challenge for those interested in a new ERP
- Assess staff backfill
- #1 anticipated challenge for those implementing
- Conduct policy review
- Establish communication plans
- #1 anticipated needed skill for those implementing a new ERP
- Conduct a comprehensive and thorough evaluation and selection process
- Assess project staffing needs
- #2 anticipated challenge for those committed and interested
- Assess project needs
- Conduct staff backfill plan
- #2 anticipated challenge for those interested in a new ERP
- Assess reporting needs
- #1 preparation for those implementing ERP
- Assess technical infrastructure
- #1 anticipated challenge for those interested in a new ERP
- Assess technical needs
- #1 anticipated challenge for those implementing
- Assess third-party integrations
- #2 planned activity for those committed and interested
- Assess project needs
- Establish third-party integrations
- #1 planned activity for those implementing
- Assess customizations
- #2 planned activity for those committed and interested
- Conduct customizations
- Secure customizations
- Conduct functional needs assessment
- Conduct technical needs assessment
- Secure comprehensive project budget
- Review current system needs
- Establish project vision and goals
- Establish a change management plan
- Clean legacy data
- Establish project staff needs
- Secure project management
- Identify institutional culture and readiness for change
- Review technical infrastructure
- #1 anticipated challenge for those interested in a new ERP
- Assess staff backfill
- #1 anticipated challenge for those implementing
- Conduct policy review
- Establish communication plans
- #1 anticipated needed skill for those implementing a new ERP
- Conduct a comprehensive and thorough evaluation and selection process
- Assess project staffing needs
- #2 anticipated challenge for those committed and interested
- Assess project needs
- Conduct staff backfill plan
- #2 anticipated challenge for those interested in a new ERP
- Assess reporting needs
- #1 preparation for those implementing ERP
- Assess technical infrastructure
- #1 anticipated challenge for those interested in a new ERP
- Assess technical needs
- #1 anticipated challenge for those implementing
- Assess third-party integrations
- #2 planned activity for those committed and interested
- Assess project needs
- Establish third-party integrations
- #1 planned activity for those implementing
- Assess customizations
- #2 planned activity for those committed and interested
- Conduct customizations
- Secure customizations

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
- On-time or underfunded implementation
- Spent more time on training and skill development
- Assessed a third-party project implementation
- 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
- Change vendors or implementers/partners mid-project
- Unpredictable 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)
- Insufficient business process knowledge

View the full report.

Thanks to CampusWorks for partnering with EDUCAUSE on the research in this report and infographic.