

System Implementation Project Management






VIP

VIP SOLUTIONS CASE STUDY






BACKGROUND

Our client selected NetSuite to implement as their new ERP system. VIP acted as the liaison between the VAR and the client and provided project management, subject-matter expertise, and implementation resources and support.

OBJECTIVES

-  Evaluate business needs and workforce capabilities to define system requirements
-  System design, configuration, and data migration
-  Conduct training and user acceptance training
-  Oversee system reconfiguration and go-live
-  Conduct post-implementation assessment

SOLUTIONS

-  Performed process mapping of current and future state requirements and assessed future state functional requirements compared to current workflow
-  Developed and designed system integration and automation plan based on future state KPIs and reporting structure needs, then assisted client with data migration templates
-  Identified training gaps and prepared training work plan
-  Developed scenario library for testing and provided step-by-step training manuals for go-live and post-implementation support
-  Project managed to ensure successful go-live through support, testing, and validation

**Utilities
INDUSTRY**

**50
EMPLOYEES**

**\$9M
ANNUAL
REVENUE**

**Successfully oversaw and executed
NETSUITE ERP IMPLEMENTATION**

System Implementation Project Management

VIP

VIP SOLUTIONS CASE STUDY

STATUS DOCUMENTATION

VIP's skilled project managers provide thorough status documentation to keep team members on-task and accountable. View an excerpt of this project's redacted status document below.

Date	Responsible	Vendor	System	Description	Due Date	Deliverable	Status
24-Jan	Team Member A	Vendor B	Vendor B	Training for testers - initial walkthru	31-Mar	Client to test business processes and rules once integration to NS is completed - send all training recordings to VIP so that documentation can be created - additional testing on demand - end user training (around go-live) - coder, approver, user training	In Progress
24-Jan	Team Member A	Vendor B	Vendor B	work on Supplier Submission Guidelines for B2B supplier to submit to OpenInvoice. This will require approval from Client and used in the supplier communications in the coming weeks.	31-Mar	Client to approve supplier submission guidelines and communicate guidelines to suppliers	In Progress
24-Jan	Team Member A	Vendor B	Vendor B	communications with suppliers regarding the switch over once go-live date is confirmed	31-Mar	Supplier Communication re: switch to Vendor B	Not Started - Team Member G will provide update based on go-live date
8-Feb	Team Member E	Vendor A	Vendor B	Schedule meeting for UAT demo - buyer side	10-Feb	UAT Demo -buyer side - completed demo 2/13 - completed Celigo demo	Client to test the complete workflow
13-Feb	Team Member A/Team Member F	Vendor B	Vendor B	Items need to be defined in Vendor B - Team Member A is looking into this How does items work in OI (pricebook?)	24-Feb	Define process for items	
13-Feb	Team Member E	Vendor A	Vendor B	pushing expense account along with PO line item detail	17-Feb	Team Member A to follow up with Team Member E	
14-Feb	Team Member A/Team Member F	Vendor B	Vendor B	Work around for invoice images - Team Member F to follow up with Team Member E	24-Feb	moving pdf invoice between systems	
14-Feb	Team Member A	Vendor A	Vendor B	Flag PO as 'good receipts required'. Need to set flag to YES. Confirm with Team Member E	17-Feb	Need to flag PO as good receipts	2/14 - Team Member A/Vendor D to follow up with Team Member E
14-Feb	Team Member E	Vendor A	Vendor B	Issue Log - who is tracking the log Log issues with connector	17-Feb	Team Member E to track issue log	
14-Feb	Team Member A	Vendor B	Vendor B	Client/VIP to outline process to log errors that are encountered in Vendor B testing	17-Feb		
23-Jan	Team Member H	Vendor C	Vendor C	Team Member H to update NS to flag who the technicians are	15-Feb	Update employee data - Technicians	Not Started
23-Jan	Team Member H/Team Member I	Vendor C	Vendor C	Preventive maintenance form - add as a service order type to complete during repair service orders	15-Feb	Team Member H to update Vendor C	In Progress
23-Jan	Team Member H/Team Member I	Vendor C	Vendor C	Vendor C to set up Vendor D on Vendor C's app as a technician Vendor C to walk Vendor D thru mobile app process from request to close Send call recording to VIP so that workflows can be updated	15-Feb	Mobile app process confirm with Vendor C	
7-Feb	Team Member A	Vendor C	Vendor C	Vendor C to walkthrough scenarios and draft up some UAT documentation for service orders	15-Feb	Draft up UAT documentation for the service orders	In Progress
7-Feb	Team Member H/Team Member I	Vendor C	Vendor C	Configuration for transportation - rental	TBD	walk-thru how at transfer & removal of rental items will work	
12-Jan	Team Member B/Cecily	Vendor D	Vendor B	Review processes for Vendor B	17-Feb		In Progress
12-Jan	Team Member B/Cecily	Vendor D	Vendor C	Review processes for Vendor C	17-Feb		In Progress