



# System Implementation Project Management

## Case Study

### Background

Our client selected NetSuite to implement as their new ERP system. S+H Consulting 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
- + Conduct training and user acceptance training
- + System design, configuration, and data migration
- + 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**



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### STATUS DOCUMENTATION

S+H Consulting'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