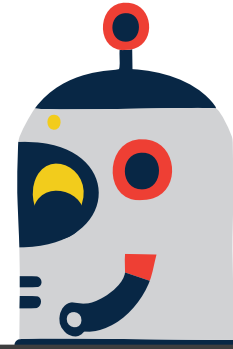


6. Leverage HR and don't over-engineer it (strategic thinking).

"They are experienced in candidate-vetting skills such as managing your own bias, assessing the breadth of competencies, reviewing applications to extract the most valuable information, etc.," Riley said. The more effective you can use that AB, the less you have to bring them in.

7. Think about an exit strategy.

A CEO colleague of Riley's had to transition a BOD member off because there was not a good fit. "That transition can be tougher [than an AB] because the corporate documents and state law would apply," he said. Advisory boards are more flexible to move people on and off. ▶



TIMELESS ERP TRANSITION STRATEGIES

◆ We've noticed that firms discuss ERP transitions often in the Pro Portal. Now, with Deltek Vision being phased out, firms are talking about transitions even more. Plus, new offerings enter ERP conversations every day. So, how do you find the best option for you?

We spoke with Hugh Glazer, a CFO consultant from WinterView Group who has helped firms select and implement the best ERP systems to fit their needs for decades, to learn more about how firms can weather ERP transitions.

TECH EVOLVES, BUT SOME STRATEGIES PERSIST

ERP has evolved dramatically over recent years, but some ERP transition strategies stand the test of time.

When you're making judgements about the right ERP fit for your firm, "the starting point is often size," says Glazer. Some questions you should be able to answer to understand size are:

- What is the size of the firm in terms of staff?
- How many active projects is the firm managing?
- What is the typical project duration? Do projects at your firm run over months or years?

Another fundamental aspect to consider is whether your firm deals with government

contracting. Your firm may be subject to Federal Acquisition Regulation (FAR) audits to ensure accounting systems and overhead rates are FAR-compliant. "It's a different kind of complication, and that can also impact the type of reporting you need and can drive the level of sophistication that you need in the ERP system," explains Glazer.

Another reality that hasn't changed is staff turnover, which means that "firms always have to be cognizant of reinvesting in training regardless of which system a firm uses," he explains, noting that in two to three years after a system goes live, oftentimes those with the most intimate knowledge of the system might have moved on to other projects or left the firm altogether.

CHOOSING THE RIGHT SYSTEM

So with these core ideas in mind, how can you figure out which system is right for you? Specifically, you'll need to understand what functionality you need from an ERP system. "It's important to understand and be clear about how your firm does billing and how you price proposals, because those requirements can drive the flexibility and data you want the ERP system to report back," says Glazer.

We all know specific AEC-centered options get frequently mentioned. In general, Glazer says that Deltek Vantagepoint and Unanet tend to scale for bigger firms, while Deltek Ajera is more suitable for medium-sized firms.



Hugh Glazer - CFO Consultant, WinterView Group

Glazer recommends that with something like BQE Core, "If you're going to use it, commit to using all of it," rather than integrating other apps with it.

Software such as Monograph and Replicon, which target A/E firms, are project management tools that "focus on graphic display of data. Other systems might have stronger integration and performance when it comes to some elements of project management and firm-wide accounting."

QuickBooks and Xero might be good options for smaller firms, even though they're not specialized toward AEC. Firms might grow

Continued on page 7

out of QuickBooks once they surpass 5 to 10 employees.

Regardless of what system you pick, Glazer says that "the principals and project managers have to invest time in learning how to use it and communicating through it. You can have something that's a perfect fit, but if people don't learn how to use it and keep the discipline of using it, you're not going to get the benefit out of it."

SENIOR MANAGEMENT INVOLVED FROM THE START

It's also critical to have senior management involved from the start. Glazer shared a graph with PSMJ that originally referred to project planning in general. But it also makes sense specifically in relation to the ERP planning process.

It's going to cost firms less to have senior management pay attention at the start of the ERP planning process than at the end. On the other hand, it'll be a more costly adjustment when principals try to adjust later on.

One time, Glazer was helping a business through an ERP transition. "We were going along, and everybody thought the principals

understood the conversation." But right at the end of the process, a principal realized he wanted data from multiple prior years to carry over to the new system. "Not only did it delay deployment by a couple of months, but there were a few thousand dollars' worth of things we had to undo and redo. It's important to have the right people at the table to articulate on what level of data is coming over." ▶

Publisher / Frank A. Stasiowski, FAIA

Published by / PSMJ Resources, Inc.,
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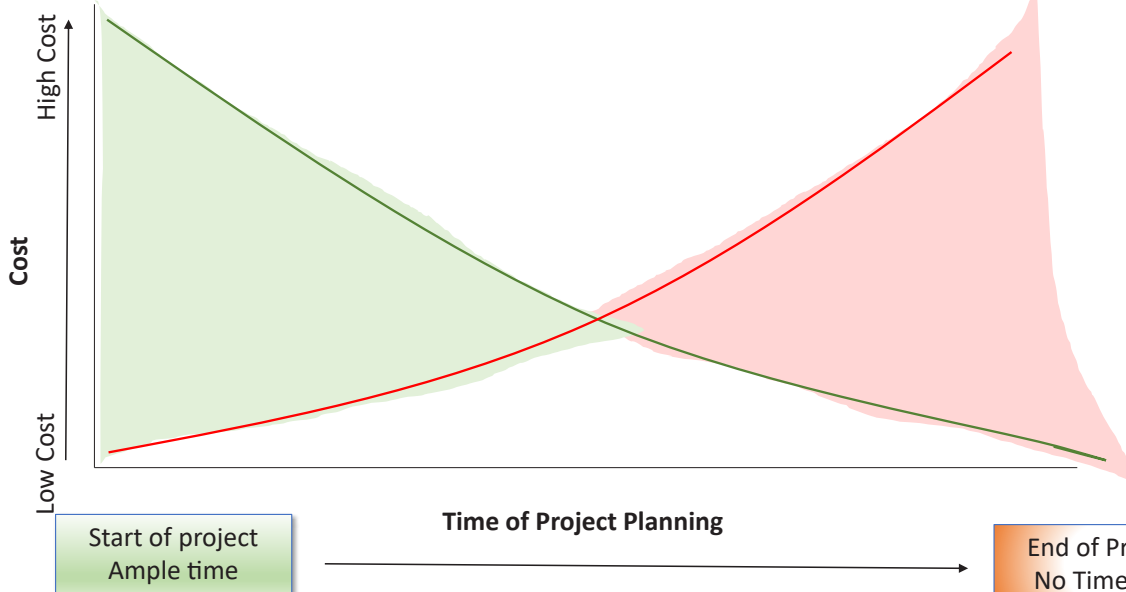
PSMJ Professional Services Management Journal is published monthly by PSMJ Resources, Inc.

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Impact of Management Involvement in ERP Strategic Planning on Cost

When Management is not involved in the ERP planning process, costs increase



- Management engaged at start of project allows for ample time to make changes as well as a properly scoped project
- Management engaged at end of project does not allow for much time to make changes and costs more to make changes last minute

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