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**Tom Kelly** • Feb. 09, 2018



Companies today realize they can no longer put up with the struggles of legacy accounting applications that don't integrate with other vital software systems, with systems that leave finance personnel laboring with Excel workarounds and a slew of manual processes. It's no longer acceptable to base critical business decisions on the often outdated or inaccurate information of these legacy systems.

Though many recognize that implementing a modern cloud enterprise resource planning (ERP) system is an obvious answer — many that start the transition are

surprised by marginal improvements, slow user adoption, and unchanged processes

positioned to lead change management in three key areas for the quickest ROI on new technology investments.

## Business Case and Implementation

A strong business case is an essential first step — as the old saying goes, "What gets measured, gets done!" Survey users to document pain points (including weaknesses in auditing and compliance) and needless time wasted on manual tasks. Assess workloads and costs imposed on the IT team. Then, set targets for quantifiable and qualitative improvements over six months, a year and beyond.

Do thorough due diligence in selecting a solution and implementation approach (internal, or with vendor or consultant support). Speaking with a vendor's customer references can give valuable perspectives on keys to success and pitfalls to avoid. A CFO-led steering committee of business and IT leaders that diligently manages important first steps greatly increases chances of rapid and sustainable ROI.

## User Engagement and Adoption

CFOs play the role of Chief Marketing Officer in "selling" a new solution to the user base. Failing to appreciate the importance of user engagement and adoption can undermine a project's success, so keep staff involved and informed from start to finish. That also puts a damper on anxiety and misconceptions that can otherwise develop.

Resistance to change is natural among users. Recognize that users may have a sense of pride and ownership in custom-built solutions or a complex Excel spreadsheet developed over time. From the outset, regular communications through in-person meetings, webinars, emails and other formats is important in getting users on board.

Build excitement by showing how a task that used to take three hours can now be

program that nurtures "super users" can seed the organization with experts to help make the most of the system — especially a cloud-based system that automatically upgrades with new features several times a year.

Participating in user conferences, user groups, LinkedIn forums and the like are useful in building knowledge that can percolate across the organization. Ongoing training is important to master all the rich capabilities of today's best software. So is sizing up the array of add-on applications from a vendor's partners that can enrich the core platform.

And don't forget the business case developed at the outset. Measure progress against goals, set new objectives and adjust accordingly.

It's a given that the right financial management system positions an organization for increased efficiency, stronger financial controls and greater insights for informed decision-making. Modern cloud solutions are simply more robust, sophisticated and cost-effective than the disparate on-premise and desktop applications of yesteryear.

But it's also true that an organization risks lackluster results or outright failure unless a strong executive-led change management program is in place, with heavy emphasis on user engagement and adoption. CFOs who take charge in leading the transition to a new technology can accelerate ROI and captain the organization to a more agile and insightful future.

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