

by Ibrahim Anwar

READ ON GOOGLE PLAY BOOKS >

What This Is For

ERP systems fail when they are configured against processes that were never documented and never standardized. The system defaults to an industry-standard template. Staff find that the template does not match how they work. They build spreadsheets outside the system to handle the gaps. The consultant bills to customize. Two years after go-live, the system is partly used and nobody is sure whether to trust its reports. This is not an ERP vendor failure. It is a sequencing failure.

This worksheet imposes the correct sequence: document the process, standardize it (bring staff variation below 20%), assign an owner, and only then hand it to the consultant for configuration. Each of those four steps is a column in the table. Any process where all four are not 'Yes' cannot be configured accurately. The consultant will work from assumptions for that process, and assumptions produce a configuration that needs expensive revision later. Every 'No' in this table is a renegotiation of the go-live timeline or a hidden cost arriving in the billable hours column.

Benefits

What you get when you actually run this worksheet on a real situation:

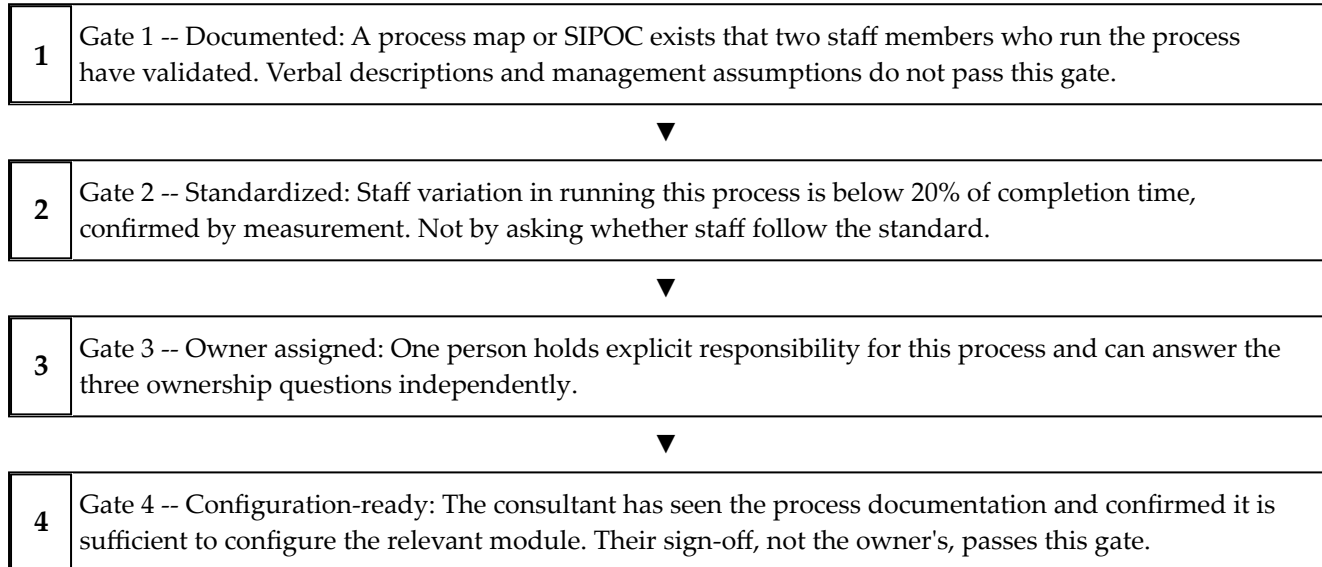
- Produces a clear go/no-go signal per process: four Yes answers means ready for configuration, any No means documentation work comes first.
- Prevents the most expensive ERP mistake: running documentation and configuration simultaneously, which doubles consultant time because every process change triggers a new configuration round.
- Creates the baseline measurement for post-go-live audit: if a process was standardized to below 20% variation before configuration, that same variation can be measured again at three months post-go-live to confirm the system did not introduce new inconsistency.
- Forces the process ownership question into the open before the system is live, rather than discovering there is no owner when the first process deviation occurs after go-live.
- Provides a project management tool: the table shows exactly which processes are ready for configuration and which are not, allowing consultant time to be scheduled against ready processes first.

Framework To Use

— Four-Gate Process Readiness Check

Four sequential gates that must each be passed before a process is handed to the ERP consultant for configuration. Gates are sequential: Gate 3 (owner assigned) cannot be meaningful if Gate 1 (documented) is not complete.

ERP CONFIGURATION READINESS -- FOUR GATES IN SEQUENCE



How To Use

Follow these steps in order. Each one builds on the previous.

- 1 List every critical process that will be configured in the ERP system. Work with the consultant to confirm the complete list -- do not assume you know which processes the system will touch.
- 2 For 'Documented (Y/N)': a process is documented if a process map or SIPOC exists and has been validated by two staff who run it. If the documentation exists but was written by management alone without field validation, mark N.
- 3 For 'Variation below 20% (Y/N)': run the Weekly Step-Time Tracker for one week on this process if no measurement data exists. Do not mark Y based on the assumption that staff follow the standard.
- 4 For 'Owner assigned (Y/N)': mark Y only if one person holds explicit ownership and can answer the three responsibility questions (how it works, who trains, who updates) without referring to anyone else.
- 5 For 'Ready for ERP configuration (Y/N)': this is your aggregate readiness signal. All three preceding columns must be Y before this column is Y.
- 6 Fill in 'Action required before configuration' for every row with any N. Be specific: 'Run SIPOC session with receiving team' or 'Run 2-week tracker and standardize inspection step' are actions. 'Improve documentation' is not.
- 7 Set a target completion date for each action. Compare against the consultant's scheduled configuration sessions. If the action completion date is after the configuration session date, reschedule the configuration session.
- 8 Share the completed table with the consultant before signing off on the configuration timeline. A consultant who does not know which processes are not ready will bill for configuration time spent on incomplete information.

Example Use

A 60-person service business is implementing an ERP system with four months to go-live. The consultant has scheduled configuration sessions starting in week three. The owner uses this worksheet to assess which processes can actually be handed to the consultant on that schedule.

Six critical processes are mapped against the four gates.

Process 1 -- Procurement: Documented Y (SIPOC exists, validated two weeks ago). Variation Y (tracker run last month, 14% variation). Owner Y (finance manager, all three questions answerable). Ready: Y. Configuration can proceed week three as scheduled.

Process 2 -- Order intake: Documented Y (process map exists). Variation N (no measurement -- two intake staff give different answers when asked how long a standard intake takes). Owner N (nobody designated). Ready: N. Actions: run tracker this week; designate owner by end of week 2. Target: complete by day 18. Configuration scheduled for day 21. Feasible -- if tracker is started immediately.

Process 3 -- Invoicing: Documented N (verbal understanding only, no written map). Variation N (unknown). Owner N (the outgoing finance officer who is leaving in week 6 informally runs it). Ready: N. Actions: SIPOC session this week with finance officer before departure; standardization measurement week 2; owner designation week 3. Target: complete by day 21. Configuration scheduled day 28. One-week margin -- tight.

Process 4 -- Goods receipt: Documented Y. Variation Y. Owner N (warehouse head left last month). Ready: N. Actions: designate new owner by end of week 1. Target: day 5. Configuration scheduled day 14. Feasible.

Process 5 -- Client reporting: Documented N. Variation N. Owner N. Ready: N. Actions: SIPOC session week 2-3. Target: complete day 28. Configuration scheduled day 21. Not feasible as scheduled. Configuration for this process must move to day 35 minimum.

Process 6 -- Payroll: Documented Y. Variation Y. Owner Y. Ready: Y. No action required.

The owner presents the table to the consultant. Two configuration sessions are rescheduled. Total avoided cost: approximately 4 consultant-days of configuration work against incomplete process information, at \$400/day = \$1,600 saved.

The Worksheet

Tear this out, copy it onto a fresh sheet, or fill it in directly.

New ERP Requires Process Redesign Before Go-Live

Scenario: A service business with 60 staff signed a contract for an ERP system. The implementation consultant has asked for process documentation to configure the system. The business has no documented processes. Go-live is in four months. The consultant is billing \$400 per day.

CRITICAL PROCESS	DOCUMENTED? (Y/N)	VARIATION BELOW 20%? (Y/N)	OWNER ASSIGNED? (Y/N)	READY FOR ERP CONFIG? (Y/N)	ACTION REQUIRED BEFORE CONFIGURATION	TARGET COMPLETION DATE

Reflection Prompts

After filling in the worksheet on the previous page, work through these.

1. Any process where all four columns are not Y cannot be configured accurately. The consultant will default to an industry template for that process. Every N in this table is a hidden customization cost arriving later in billable hours. Resolve Ns before scheduling the configuration session for that process.
-

2. Sequence is non-negotiable: document first, standardize second, assign owner third, hand to consultant fourth. Running two steps simultaneously does not save time -- it doubles the cost of each step because every undocumented process change requires a configuration revision.
-

Tips and Traps

TIPS

- Show this table to the consultant at the first meeting, not after the configuration schedule has been set. A consultant who sees which processes are not ready can schedule their time against ready processes first, avoiding the renegotiation of a timeline already in contract.
- The target completion dates in this table become the binding constraint on the configuration timeline. If a process action cannot be completed before its scheduled configuration session, that session must move. Do not let the consultant bill against an unready process.
- Process 5 in the example above -- documentation, standardization, and ownership all N -- needed a minimum of 28 days of preparation. Any process at that starting point requires at least four weeks before it is ready for configuration. Build that buffer into the timeline.
- After go-live, run the variation tracker again for any process where Gate 2 was borderline (17-20% variation). A system that introduced new steps or formats can push variation above 20% again within the first month.

TRAPS

- Marking a process as 'Documented Y' because a process map exists that was never validated by the staff who run it. A map written by management from memory is a hypothesis, not a documented process. Validation is mandatory for the Y to mean anything.
- Assuming the consultant will catch and correct undocumented process gaps during configuration. Consultants configure what they are shown. They cannot identify what they were not told. The business owner is responsible for the completeness of process documentation before configuration begins.
- Running documentation and configuration simultaneously to save calendar time. Each process change during the configuration phase triggers a new configuration round. The time saved on the calendar is spent twice in rework. Sequence saves money.
- Treating go-live as the finish line. The four gates in this worksheet should be re-checked at three months post-go-live. Staff behavior under a live system sometimes reveals documentation gaps that the pre-go-live preparation missed.

Appendixes

Appendix A -- Configuration Readiness Timeline Template

Use to align process preparation against the consultant schedule:

Process	Gate 1 done	Gate 2 done	Gate 3 done	Config date	Gap (days)
-----	-----	-----	-----	-----	-----

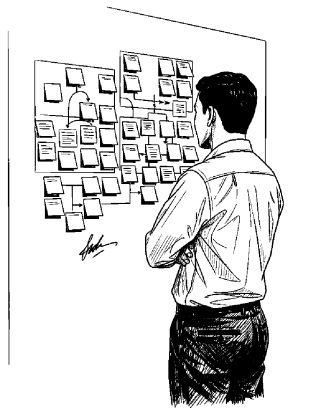
Gap = Config date minus Gate 3 done date.
 Positive gap: process will be ready before configuration.
 Zero gap: tight. Any delay in preparation pushes config.
 Negative gap: configuration is scheduled before process is ready. Reschedule the config session.

Appendix B -- What to Bring to the First Consultant Meeting

Before signing a configuration timeline, prepare:

1. This worksheet, completed for all processes in scope. Processes with any N in Gates 1-3 are not ready.
2. A list of processes with their estimated preparation completion dates (Gate 3 done dates).
3. Questions for the consultant:
 - a. Which of our processes can you configure against our documented SIPOC/process map directly, without adapting to your industry template?
 - b. What is your procedure when process documentation changes after configuration has begun?
 - c. What is the configuration billing trigger -- work started, milestone reached, or session completed?

Answers to question (c) determine whether an unready process that enters a configuration session generates a billable charge even if no configuration can be completed.



WHERE THIS WORKSHEET COMES FROM

Business Process Reengineering

A Process That Has Run a Long Time Is Not Necessarily a Correct Process

by Ibrahim Anwar

This worksheet is one of nine in the *Business Process Reengineering* companion worksheet pack. The full pack is grouped into three categories: high-volume worksheets you can run weekly, niche-search worksheets for rare but high-value situations, and specific-case worksheets that walk you through a single concrete scenario.

Every framework, decision filter, and figure used in these worksheets is drawn from the chapters of the source book. The book sets the diagnosis, the worksheets give you the form to act on it.

Read the source book on Google Play Books:

<https://play.google.com/store/books/details?id=VYvXEQAQBAJ>

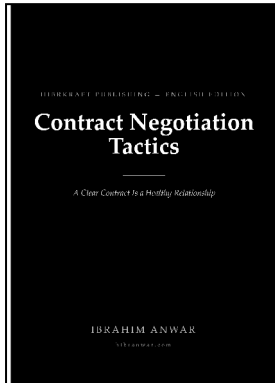
OPEN ON GOOGLE PLAY >

PT Hibrkraft Kreasi Indonesia · Cileungsi, Bogor · hibrantwar.com

CONTINUE THE SERIES

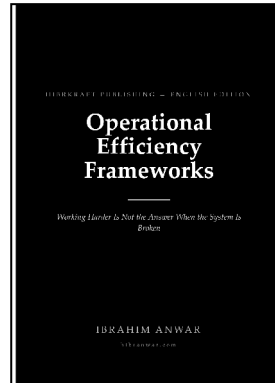
More from the Operator's Handbook

Each handbook is a 9-worksheet companion pack like this one. Tap any cover to open it on Google Play Books.



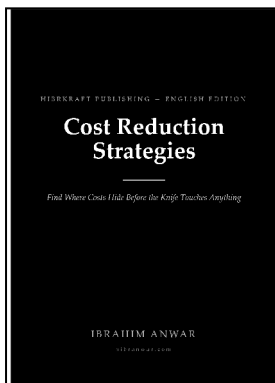
NO. 13 ·
OPERATOR'S
HANDBOOK
**Lean Operations
Principles**
*Eliminate Waste Before
Adding Capacity*

OPEN ON GOOGLE
PLAY >



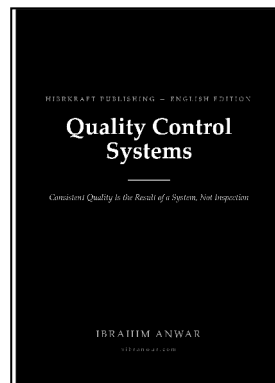
NO. 06 ·
OPERATOR'S
HANDBOOK
**Operational
Efficiency
Frameworks**
*Working Harder Is Not the
Answer When the System
Is Broken*

OPEN ON GOOGLE
PLAY >



NO. 01 ·
OPERATOR'S
HANDBOOK
**Cost Reduction
Strategies**
*Find Where Costs Hide
Before the Knife Touches
Anything*

OPEN ON GOOGLE
PLAY >



NO. 17 ·
OPERATOR'S
HANDBOOK
**Quality Control
Systems**
*Consistent Quality Is the
Result of a System, Not
Inspection*

OPEN ON GOOGLE
PLAY >

Operator's Handbook · PT Hibrkraft Kreasi Indonesia · hibranwar.com