Chapter V

Enterprise Systems Implementation Phases

Introduction

Markus and Tannis (2000) recognise four distinct phases in an enterprise systems implementation as viewed from the adopter's perspective. The very first phase is called "chartering." They suggest that even before the project starts, a business case is usually made whether to go ahead with the enterprise system implementation or not, and it is only after the business case has been made, and the constraints of the solution have been understood, that the project actually starts. The project never starts if the constraints are too much, or the business case is not strong enough. The second phase is the project phase in which the software is configured to suit the requirements of the organisation and implemented in the organisation. The third phase is the shakedown phase,

during which the organisation moves from the go live status to the normal operation status. This is the time that it takes an organisation to get back to normalcy. The fourth phase, according to Markus and Tannis, is the onward-and-upward phase. It is in this phase that the organisation attempts to realise all the benefits, or the majority of the benefits, that they believe that they could obtain by implementing the enterprise system. But apart from realising the benefits, this is also the phase when the organisation plans ahead for future enhancements to the system, as well as to the processes and the organisation. In a cycle of continuous improvement, this phase merges into the next project phase where the software is reconfigured, or new software is configured, which will enhance the current operations. Thus, Markus and Tannis identify that each of the four phases have specific activities: Phase 1, project chartering where ideas are turned to dollars; Phase 2, the project phase where dollars are turned to assets; Phase 3, the shake down phase where assets are turned to impacts; and Phase 4, the onward-and-upward phase where the impacts are turned to performance.

Parr and Shanks (2000) identify three phases that have similarities with Markus and Tannis' phases. Phase 1 is planning, which is equivalent to the chartering that we looked at earlier. Phase 2 is the project phase, which is in turn divided up into setup, reengineer, design, configure, test, and installation. And this cycle of steps in the project could be repeated either for the different modules that we are implementing, or for the different business units where we are implementing. Phase 3, according to Parr and Shanks, is enhancement, which maps with the onward and upward phase of Markus and Tannis. The only difference between this model and the previous model is that Parr and Shanks have not explicitly considered the shakedown phase that Markus and Tannis identify in their model or life cycle.

Callaway (1999) proposes a more elaborate set of steps. Callaway suggests that any enterprise system project would be comprised of the project preparation phase, planning of the business processes, configuring the system according to the planned business processes, testing and validating of the configured system, final preparation of the system, and finally, going live with the system. These six phases encompass most of the activities that go on in an enterprise system project. In addition to this, we would like to suggest that project preparation should be preceded by the chartering phase, as identified by Markus and Tannis, because it is in the chartering phase that you decide whether to go ahead or not with the project. And if you decide to not go with the project, then you never even start on the project.

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