ERP:
THE KEY LINK TO YOUR DIGITAL TRANSFORMATION

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Expert Opinion

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Introduction

Digital transformation, everyone's talking about it. It is often argued that digitizing your processes is absolutely necessary to keep your organization at a high level of competitiveness.

Many players in this digital revolution are constantly trying to remind you how essential it is to transform yourself. We think you have a good understanding of the challenges that come with digital transformation so there's no need to add on. However, once the question of "why" is figured out, we find it very difficult to find an answer to the "how". In other words, how do you carry out the successful digital transformation of your company? Which methods? With what tools?

In this E-Book, we present our best practices to get your digital transformation off to a good start. We will cover multiple topics but we are going to focus on one software solution in particular: ERP.

Enjoy reading!

DIGITAL TRANSFORMATION : WHERE TO START ?

It's everywhere. In the specialized media, throughout professional networks, all of your peers are talking about it... This word is in everyone's mouths: DIGITALIZATION. Regardless of your internal organization's current state, you are encouraged from everywhere and everyone to digitize. But what exactly should you be digitizing?

You have heard about all the advantages digital transformation can bring to your company. You have received a lot of feedback from companies that have successfully navigated the digital shift and you want to position yourself on the tail of this success. However, there are several obstacles that you must overcome in order to succeed. First, it's important that you establish a true digitalization philosophy within your teams? Then, you have to figure out which operational solutions are appropriate for the specific needs of your organization. Finally, you must set a realistic project scope and decide whether or not you can really transform EVERYTHING in your company.

Here our goal is to help you plan your digital transformation, from the definition of your objectives to the actual digitalization of your operations.

What Layers of Your Company Can You Digitize?

There are many indicators to help measure the operational performance of digitization. You can find the details of these indicators in the following post: Successful Digital Transformation: Follow The Guide!

However, one of the first things to remember is that successful digital transformation has to happen in stages. Don't try to fully digitize your company too quickly! If you do, you run the risk of creating a brutal break in your pre-existing processes and disrupting your teams — which would be completely counterproductive...Here are the different areas of the company that you can transform, step by step.

Human Resources : A Key Sector For The Digital Transition of Your Business

Digital transformation has literally increased the number of roles assigned to HR professionals. In fact, the human resources sector, traditionally a purely administrative role, now has to coordinate many aspects of business management. The HR function is now the driving force behind everything related to people in the organization: it is considered a true "Business Partner," as Deloitte would put it.

Take payroll for example. It can now be completely digitized: online newsletters, automatic compliance with current regulations, increased data security, management via the cloud. This occupation, however, which is usually tedious and complex, is simplified with the power of digitization.

The Sales Department: Entrusting Digital Technology To Take On Time-Consuming Work

The ways of the traditional salesman have been shaken up, but digitization gives unexpected strength to these updated practices.

Modern software solutions (which we will elaborate on later) allow sales teams to save time and focus on the most important part of their work: the customer/prospect relationship.

Take CRM for example. The true hub of the sales workflow, CRM (Customer Relationship Management) allows sales teams, among other things, to use a single tool to find all customer relations history and follow-up on prospects while automating various tasks that are considered trivial and monotonous.

What Are The Software Solutions For Digital Transformation?

Software is a company's catalyst for digital transformation but software alone isn't enough. Support and in-depth reflection is necessary and are two elements that will ultimately enable your company to adopt good practices in the digital age. It is therefore essential to choose the right software solutions for the operational implementation of your digital transformation.

What are these software solutions? Here are the main ones to keep in mind…

ERP : Transforming From The Inside

ERP (Enterprise Resource Planning) can be considered the control tower of your digital transformation. An ERP provides cross-functional business management solutions: project management, production, accounting/finance, logistics/inventory management, sales, human resources, etc. In short, ERP, formerly called IMS (Integrated Management Software), is the most typical solution for digital transformation. Its function is to share the management of the organization, by interconnecting data, machines, employees, existing customers, future customers and beyond.

ERP is considered to be the foundation on which the various solutions that drive digital transformation will be based upon. Among the ERPs on the market are SAP, Microsoft Nav, Odoo, Cegid XRP, Sage...

CRM : Transforming Customer Relations

CRM, or Customer Relationship Management, is one of the most essential elements of digital transformation. SalesForce, Sage CRM or SugarCRM are tools that are revolutionizing industry sales tracking. CRM is the IT solution that enables customer support throughout the entire buying process, from inception to decision making. But with CRM, the sale does not mark the end of the customer relationship. CRM will also contribute to customer loyalty. A customer relationship management tool gives you increased visibility on prospecting progress (first contact, information on prospects, scheduling reminders...).

Digital transformation is a long-distance race. As we have seen, if you want to digitize all the lines of operations in your organization, it is essential to proceed in stages. tackling HR and the sales department can be good first steps. Of course, the ideal is to find a software and a partner who will be able to support you over the long term and evolve with your company… Alone we go faster, together we go further!

SUCCESSFUL DIGITAL TRANSFORMATION : FOLLOW THE GUIDE!

Companies that have already started their digitalization will tell you: the path to transformation is filled with pitfalls. There are many obstacles that can potentially destroy an organization's desire for digital transformation. Generally speaking, the following objections can be noted:

- "Our operating processes are far too heavy to be transformed"
- "We don't have time to transform ourselves"
- "Our teams will be resistant to change"
- "Digital transformation is not suitable for my industry or the size of my company"

We are not going to dismiss all these fears with a few answers on a case-by-case basis. Through this post, we would like to share some indicators that will allow you to analyze the performance of your digital transformation and remove any obstacles you may encounter.

Agility & Customer Focus :
The Key Points For Success

The word "agility" is currently a hot topic. A company's ability to streamline its processes, rapidly evolve them, operate in a more cross-functional way, etc. is very telling in a climate of constantly changing markets. For example, reducing decision times and the time required to launch an offer is one of the biggest challenges of digital transformation. These times are therefore excellent indicators of the transition to an agile organization.

But, if digital transformation makes it possible to make changes that are beneficial to the company's internal processes, it's imperative that it sparks transformation that is customer-oriented as well. The implementation of an agile organization fosters more exchanges and better communication and ultimately allows for a better understanding of customer needs. It also makes quickly responding to these needs possible. An organization that focuses on «customer-driven» digital transformation has a sustainable competitive advantage. The latest studies show that customers are increasingly putting customer service at the top of their decision-making process.

Through efficient data use, digital transformation can also help improve customer experience. For example, analyzing your customer database with the right software gives you fast access to information about your customers' buying behavior and allows you to quickly adjust offers to better suit them.

Aiming For Operational Excellence To Push Further Growth

Digital transformation can turn into a fiasco if you make the wrong choices. It is therefore important to seek operational excellence in each of the decisions you make during your digitization process. Think about processes and how to optimize them: how can they be improved? Is it possible to share certain tools? Can digitalization help break the silo mentality within my company?

Operational excellence is measured by several indicators including;

· Employee productivity
· Employee recruitment and retention
· The quality of new processes and error analysis
· Information system costs
· The influence of innovative development partners

Nevertheless, operational excellence is not an end in itself. Digital transformation must enable business development and extended reach into new markets. The indicators used to measure the impact of digitization on your business are; differentiation from competitors, the implementation of new digital solutions, and of course the new sources of revenue generated since your switch to digital.

DIGITAL TRANSFORMATION: WHY GO THROUGH AN ERP?

Are you looking for a solution that can meet ALL your digital transformation needs? What if ERP is THE solution for you? In this section, we will briefly explain the different roles that the implementation of an ERP can play in your organization.

Pooling Processes to Optimize The Bridge Between Internal And Customer

ERP is a software solution based on uniqueness: a single software in which all the information and operational services of an organization can be found. This allows for enhanced monitoring and responsiveness in the event of a malfunction. A modern integrated management software package (such as Odoo for example) meets the agility needs of a company by making data access easier and radically accelerating problem identification. ERP also plays a key role in the collusion between back-office and front-office. Indeed, as we have seen before, meeting the needs of a customer/user-oriented operation requires making internal processing flows more fluid and being able to listen to and analyze customer feedback.Data is the key to this evolution. The central role of ERP in accessing data from different layers of the company is therefore crucial to align its processes with market reality.

Save Your Time
Save Your Money

In a more concrete way, ERP allows a company to improve its profitability. The software centralizes information so that anyone in the organization can have it available. This facilitated access provides increased visibility into each other's capabilities, needs and current tasks. The digitization of company management, facilitated by an ERP, also makes it possible to limit error risk, save considerable time by avoiding duplicate data entries, and ultimately improve an organization's productivity.

From the conversion of an order payment to its accounting and customer entry; from the real-time monitoring of inventory and production progress to customized marketing automation actions, ERP is capable of optimizing all of a company's workstations.

ERP synchronizes a company's processes and digitizes a company as a whole little by little in order to enable the adoption of good practices . Of course, the idea is not to for the company to model its way of working on the structure of an ERP, which could instead rigidify the organization, but rather the other way around. By choosing a modern, ergonomic and customizable ERP software, you will be able to take only «the good» and mold all remaining elements to your specific needs. Obviously, to make the right choice, you want to have a solid partner ...

CHANGE MANAGEMENT : AN ERP THAT ADAPTS AND TRANSFORMS YOU

Spark revolution, not war! Before starting to shake things up in a company, it is important to make employees understand the benefits of digital transformation that accompany the deployment of an ERP. The implementation of such software in an organization requires a change management process that is well thought out so that the entire company can move in the same direction.

In order to deal with any resistance you may encounter, your company's choice of ERP and deployment plan has to be strategic. Here are some tips on how to manage change calmly and effectively in your organization.

An ERP That Improves Structure & Adapts To Your Company

History has shown that the most significant revolutions have not been the most radical. As we have seen, ERP plays a major role in a company's digital transformation. However, the integration of management software must under no circumstances create a radical break in the organization. Like any newcomer to a team, it is up to the ERP to integrate well into the company's dynamics before gradually adding value. An ERP service provider is capable of facilitating this integration.

So, before implementing an integrated management software package in your organization, it is essential to «market» the project. You must inform employees that changes to internal processes are to be expected and that they will be involved in their redesign. Information and involvement are the keys to success. If you do not communicate and carry out your ERP project alone, there is a good chance that you will be the only one using it... ERP can sometimes be perceived as a «Big Brother» who will be able to control everything the employee does, or as a robot who will replace them and cause job loss... This isn't the impression you want.

To get off to a good start, the ERP must first fulfill its mission as a data centralizer and exchange facilitator. Employees must keep the image of the ERP as a practical tool made to optimize their performance and not as a bad omen sign that will disrupt their current workflows. This is why part of a smooth integration involves including employees in the dynamics of organizational transformation..

An ERP That Smoothly Accompanies The Radical Changes Created by Digitization

In order to respond to employee resistance to change in the face of digital transformation, the restraints holding them back must be addressed. At this level, communication should focus more so on management issues and less on technical explanations around the implementation of IT solutions. The employee must feel involved. And to get involved, you have to be motivated!

To find a motivational argument that will raise awareness among your teams, you can use the Valence / Instrumentality / Expectation framework of Victor Vroom (1964). Of course, you'll have to adjust it to fit your context.

For example, having an ERP will allow the sales team to have visibility and traceability of their actions. This will allow them to properly evaluate their chances of success in their projects (Expectation).
Then, with the CRM being integrated into the ERP, they will have an effective solution to keep them constantly updated with prospect follow-up and provide relevant data on the people to contact, ultimately, maximizing their chances of closing sales. Their sales success will enable them to increase their commissions (Instrumentality). In addition, the features offered by an ERP will give employees more value in their work (Valencia), by automating menial and time-consuming tasks.

Although digitization somewhat implies delegating part of the company's management to software, the employee must remain at the heart of digital transformation concerns. Management and employees are not just witnesses to the transformation, they are the main actors. By integrating new technologies and new market requirements, businesses are reinventing themselves; literally transforming the company.

ERP SERVICE PROVIDER: WHICH ERP INTEGRATOR FOR MY INDUSTRY?

Whether you are an external consultant or a business decision-maker, you understand the difficulty of finding the ERP integrator that will perfectly meet your needs. Here are some ideas to create the "check-list" that will help you find the RIGHT integrator.

The Checklist As The Only Starting Point

You can't imagine what an ERP can do for you… In other words, a company wishing to deploy an ERP to digitize its business management does not necessarily know all the possible features that the software solution can offer. However, apart from the needs outlined in a company check-list, additional or other services can greatly improve the organization's processes, or not. This is where the intervention of an ERP integrator can become of interest. A good integrator must be able to challenge your check-list, and analyze the requests that may have been made (not all of them may be essential to get started), etc.

An Integrator With Experience In Your Industry

When an integrator has extensive experience in your industry as well as experience with companies of a similar size to yours, then the integrator will be able to support you with precision and efficiency in your ERP deployment. An integrator who has only worked with very small companies, for example, will have difficulty measuring the efficacy of deployment in a larger company. To be certain that the integrator has the experience that matches what you are looking for, do not hesitate to take a look at the ERP integrator's website. Provider websites will sometimes share customer feedback that could help you plan ahead. And of course, feel free to ask them directly for customer testimonials or even references to call, this is still the easiest way.

An Agile Operational Organization

Do you want to direct your company towards greater agility? Use an agile ERP integrator! What could be better than a service provider that already has this mode of operation, to install agile processes within your organization? In addition, an IT service provider is not only formed by knowledgeable technicians but also consultants who provide support throughout software deployment. Like you, they should also be aimed at operational excellence. Above all, your service provider must be able to understand your needs and be proactive in the implementation of the management software. An integrator must help you exceed your objectives.

The ERP Specialist You Have selected

ERP is the most complete software solution among company digitalization tools. There are several hundred softwares on the market. An integrator that claims they are competent in the installation of any ERP should be taken with a grain of salt...

To be sure you'll complete your ERP project, call up a specialist. At Captivea, we focus on a single solution: Odoo. Captivea is one of the top Odoo gold-certified integrators in the world. We consider the Odoo to be one of the most efficient and complete softwares on the market. You can also consult our E-Books on this subject. We have focused on this software in order to offer you an expertise that prepares us to properly respond to each of your needs.

DIGITAL TRANSFORMATION WITH ODOO: AN ERP MADE FOR YOU?

It's decided, you want to accelerate your digital transformation using an ERP. Good decision! However, with so many available softwares, how do you decide which solution is right for your organization? Among the major players on the market, Odoo seems to us to be the most relevant and efficient solution to support you. We will explain why.

Odoo :
A Modular Solution

Admittedly, one of the essential characteristics of an ERP system is that it covers many layers of business management. Making all ERPs are complete solutions...However, Odoo has the advantage of offering a multitude of modules. Odoo is capable of covering extremely precise needs but is also very fast to implement.

Whether it is sales representatives (electronic signature, mobile application available offline, automated email campaigns for specific segments, pipeline management, multi-addresses, generation of sales statistics), project managers (Kanban, Gantt, shared agendas, deadlines management) or HR managers (centralization and dematerialization of recruitment, annual evaluations, HR expenses, absences, expense reports, etc.), each area of business will benefit.

Maximum Customization

Odoo is a real «chameleon» when it comes to ERP. By its nature as an open-source solution, Odoo is made to match perfectly with each of the companies that use the software tool for management. Its customization possibilities are endless.

Regarding e-commerce, for example, even if Odoo offers its own dedicated platform, you can easily integrate Odoo with your pre-existing marketplace (Prestashop, Magento, Shopify, etc.) In terms of inventory management, Odoo provides customizable alert features to immediately report any disruption that may affect the proper management of your inventory. Carrier strikes, bad weather, power cuts. You can even create alerts on products or suppliers that will appear when a seller creates a quote.

An Interface Designed With The "end-user" In Mind

Odoo has the undeniable advantage of being pleasant and intuitive to use. The software has a very ergonomic interface, which is one of its main strengths. In other words, Odoo is a «user-centric» ERP that will ensure easy handling for your teams. Every application offered by Odoo can be picked up and understood in a few clicks so no need for long hours of training...

With a modular layout, almost infinite customization possibilities, and exceptional ergonomics, we believe that Odoo is the best ERP to support you in your digital transformation. Of course, even if we have only presented 3 advantages in this post, there are still many reasons why you should adopt Odoo. To learn more, do not hesitate to read our other blog posts or discuss them with a Captivea consultant!

Conclusion

ERP is the best solution to truly transform your organisation's processes. It allows you to approach digitalization through all the company's business areas. In addition, an integrated management software package will allow you to transform yourself gradually and evolve over time. With its state-of-the-art ergonomics and its agile deployment possibilities Odoo is an essential part of ERP. What would be the possibilities if you tried Odoo to achieve your digital transformation?

About Us

Founded in 2007 with the aim of supporting and adding value to company information systems, Captivea now has a staff of nearly 40 people, spread between Los Angeles, Orlando (USA) and Chambéry, Grenoble and Paris (France).

The company operates in 2 major areas. The first being the integration of business management software through the use of ERP, CRM, marketing automation and business intelligence software. The second area includes the development of tailor-made solutions and applications in addition to the implementation of e-commerce sites.

Captivea partners with SugarCRM, Odoo and Mautic to offer its clients market-standard software solutions that are flexible, easy to deploy and simple to use. These softwares are then customized to meet the specific needs of each client.

Thanks to more than 200 clients, ranging from SMEs to major corporations across various industries, Captivea has developed real expertise and a solid understanding of business issues over the years. Its main goal: to develop added value! The method: to put people at the heart of the project and to build a sustainable, trust-based relationship with its clients. Captivea is a team of passionate people dedicated to servicing your information system!

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