

# *Why Should I Hire a Consultant?*

By Richard L. Whaley  
Senior Business Consultant  
Orlando, Florida

It happened again last week. A prospect said, “I don’t need your services, we will install your software and implement it ourselves.” Even a doctor attempting to perform surgery on himself would have a better chance of success than most of these companies!

When a firm decides to make a major investment in their business management software infrastructure, they have decided already that the current software is not working properly. Sometimes, the company has simply outgrown the software. Sometimes they need new features and functions not available in their current package. Many times the company has so many issues with the current product that management has decided that it can not be fixed and must be replaced. In any event, the firm has decided to embark on a major project involving new software with new features and new opportunities to manage their operations in an improved way. Then, in a misguided attempt to trim expenses, they decide to apply all of their existing old knowledge to the new and different system.

There are a number of distinct and specific skills that are needed to properly implement an ERP system. Certainly, some of these skills might be found in the current staff of the company. Seldom, if ever, have all of the necessary skills been found on the payroll ledgers. Consider what is required to successfully implement a new business management software package.

**Software Installation Skills.** Yes, the simple insertion of the cd into the server and loading of the software is a skill that could be found on most IT staffs. At this point in the implementation, if something goes wrong, you can simply erase everything and start over, right? Most of the time, yes, but not always.

The installation of the application is the foundation upon which everything else will reside. Some software products have a straight forward installation process and little, if anything, can go wrong. Other products require careful placement of components, proper mapping of drives, et cetera, to ensure everything works correctly. Sometimes the problems caused by an improper install are not discovered until much later, when it is too late to erase everything and start over.

I visited an installation a few months ago where notes attached to customer, employee, and item records were recorded in an OLE container. The application had been installed and the OLE container mapped to a location on the server using the UNC path convention. Everything seemed to work correctly. Several months after the install, a payroll note was found attached to a customer record. Imagine the surprise of management when this confidential note had been read by members of the sales department. Simply changing the OLE path to a drive letter resolved the issue, a subtle point of the installation not documented in the software vendor's instructions.

Allowing a team that is knowledgeable in the new product to perform the physical installation of the software will leverage their knowledge of the subtleties of the product and avoid embarrassing or operational issues in the future.

**Training on the Software.** One of the most humbling experiences I ever had was to teach a class for the first time on a topic that I knew well. I was completely surprised by the number and diversity of the questions asked by the students. Oh yes, I got the answers to the students, with some additional effort, and became a better instructor

because of it. Each time I taught that class, I continued to learn more and more about the material, material, material on which I was already considered to be an expert.

But simply knowing the material that is to be taught does not qualify one to be an instructor. Different people learn differently. Some can listen to a lecture, sit down with the software, practice a little and have everything they need. Others must read step by step instructions and follow them on the keyboard to learn the processes. Some people must understand every nuance of the software and how every piece of information is brought to the screen while others need to ignore these details and focus solely on the task at hand. An instructor must not only know the product but must understand how different people learn.

I recently finished an install of a sales and distribution system at a client. We had 30 plus people involved in the classes and I was the only trainer. We started with a half day seminar where everyone listened and watched as I demonstrated the software product, told them how it worked and how to enter orders. Later in the day, everyone went back to their desk and practiced. A number of the students sat down, promptly entered orders, and processed them correctly. I worked with several one-on-one and directed others to the online manuals, documentation they used to help them learn and enter orders. Finally, I sat down with one particular person, walked her through a simple set of steps to enter an order focusing her on the task at hand, and sat and answered questions as she repeated entry the process time and time and time again until she learned it.

When a prospect tells me that they can train their own staff, most often they look solely at how they learn and expect everyone in the firm to be able to emulate their success. Yes, there are people that can take a book and a terminal, sit and practice, and become fully versed the new software product. Others will need a presentation or a tutor, different forms of assistance in learning.

A good software trainer is well versed in presenting the same material in many different ways, each way suited to a different type of student, students that lean in different ways.

When material is only presented in one manner, many of the students will fail to learn. This is not a failure of the student but a failure of the instructor. A company cannot assume that simply because a key person or two can absorb the operations of a new software product without the assistance of a qualified trainer that all of the staff can do likewise.

**Configuration of the Software.** When desktop systems first became available and business management software was written, if you wanted to computerize your business, you adapted your business to the software. Today, modern ERP systems have evolved significantly and provide countless variations on their operations, accommodating a wide variety of business practices.

In their efforts to become “all things to all businesses”, ERP systems have become configurable. During the setup of the software, many decisions must be made, some reversible, others that once made cannot be changed. General Ledger account number formats, part number formats, the use and application of late fees, how invoices are to be entered and billed to customers.....there can be hundreds of choices that a company must make during the implementation of a new software package.

Most firms understand how they want to conduct business. What they don't know is how to set the many configuration options in the software to accomplish this. You must work closely with a knowledgeable consultant with a free exchange of ideas and concepts to get today's software products configured properly.

It is important that these choices be made correctly. Changes made later in the implementation may not be possible. Other times, where changes can be made, imposing another change on the staff can lead to a failed implementation for an altogether unexpected reason, the staff will reject the software! I visited with one firm recently that was shopping for new software when their existing product was totally suited to their

operations. However, during the installation, management had made change after change after change in the way in which the employees would be using the product. As one scheme was put into place, problems were encountered. Management would make a change to the scheme to attempt to solve the problem and retrain the staff. After several such changes, the staff members were so confused about what to do when that the number of mistakes being made were tremendous. The implementation had failed solely because the new software had not been configured properly for the business initially.

**Professional Consulting Services.** This is the area least understood by business people implementing new software products. “How,” they ask, can an outsider come into our firm and understand what we do better than we do? We know our business!” And that’s correct, as far as it goes.

Successful business people do know their business. And, they apply to that business all of the expertise that they have accumulated throughout their professional careers. They hire as management others that have a variety of expertise as well, attempting to bring into their firm the accumulated experiences from a wide collection of sources.

Seldom, however, can they find an individual with as much experience as a consultant. Implementation consultants spend their life moving from one firm to another, sometimes working on as many as 8-10 different projects a year. With each project, they accumulate experiences and knowledge of business practices, techniques that can be leveraged into the next project.

The implementation of a new business management software package provides a unique opportunity to change some of the habits of your company and to implement new, more efficient and effective processes and procedures. But where do these ideas come from? Certainly, your management has ideas of their own. Otherwise, you would not be as

successful as you are today. But your implementation consultant will also be able to bring many new ideas to the table and will often see problems that you have never noticed.

Often I walk into a firm whose internal procedures have grown up piecemeal. Someone in one department needs some analysis of inventory and puts together a spread sheet to solve the problem. The spread sheet is carefully maintained week after week. The order entry department makes a change in the way they process orders to gain some efficiency of their own. But no one ever tells the inventory department that now, printing a simple report in 2-3 minutes will provide the same information as the spread sheet that is taking 3-4 hours per week to maintain.

I saw one firm that was having 40-60 packages returned each week due to bad shipping addresses. They were taking orders on the web, importing them into their ERP system, packing the product, printing shipping labels, and having UPS make deliveries. When they realized how many packages were being returned, they hired a new person whose job it was to check every new address. Still, many packages were returned. I took a different approach, looking instead at the web site. I entered an order and typed an address into the form some 100 characters long. Knowing the software package they were using, I knew immediately that it could only hold an address line of 40 characters. In many cases, apartment and suite numbers were being lost in the import. Simply limiting the length of the address line on the web page solved the problem and saved this firm thousands of dollars a month, not to mention the faith of their customers.

These are experiences that only an implementation consultant can bring to the table. No one expects an implementation consultant to know absolutely everything about your business operations. But, as part of a team that includes the outside consultant and key people from your firm, strategy sessions involving an open examination of issues and exchange of ideas will provide many more solutions, solutions that will make your new software a much greater success than could be accomplished solely by internal staff.

A software product is a tool, a tool your firm uses to efficiently operate your business. A hammer is also a tool. Most of us can use a hammer to hang a few pictures or to nail up a board and provide a little support to an otherwise shaky wall. Used incorrectly, that hammer can do more damage than good. But in the hands of a skilled carpenter, that same hammer can be used to build a beautiful new home, to craft fine frames, countertops, and functional alcoves. Experience, not the tool makes the difference.

You want to keep the costs of operation of your firm down? Then work WITH an implementation consultant. Utilize their experiences. Perform as much of the implementation as you can. Learn from the consultant. Share ideas and expand the abilities of your staff and firm. The efficiencies gained will far outweigh the short term costs of the consultant.

Leverage their expertise to your benefit.