

Key variables in determining the timeline for successful ERP integration of acquired companies



Key variable	Fast timeline (3-6 months)	Average timeline (6-12 months)	Slow timeline (12 months+)	Success indicators
Data complexity – acquired company	Simple data set expressed in limited volume with a particular focus on small number (<1,000) of assemblies and items in general <10,000. Pricing is simple, consistent and readily explainable to a third party.	Data sets of <200K items with no more than 20K in assemblies. Data source is a relational database, ideally SQL based. Pricing is complex but is limited in breadth.	Large data sets (>200K in items) with high percentage of assemblies. Pricing is complex with many variables by customer, vendor and/or item. Further complicated if data is coming from non-relational database such as Quickbooks.	Success is measured by how well the data is structured and imported into the new ERP system without errors or omissions. Key metrics include the ability to accurately produce transactions in new system along with accurate reporting.
Data cleanliness – acquired company	Consistent item nomenclature and item creation is restricted to "item data specialists". Evidence of an historical and active approach to data governance. Key question: "Who can set up items".	The dataset has some inconsistencies, but issues are manageable. There may be occasional duplication or outdated information, but overall item data follows a defined structure. Some mitigation efforts will be required.	Data has not been maintained or updated in years. Processes allow for endless duplicates. A very large amount of mitigation must be done prior to integration.	A clean dataset should reduce errors, improve reporting accuracy, and eliminate duplications or outdated records.
Data ownership and knowledge – acquired company	Clear evidence of a data owner(s). Identifiable users who know the data well, can explain it and help translate definitions to new ERP.	Multiple "owners" of same data set. Any lack of institutional knowledge can be mitigated by third party data consultants who at minimum know the data structure.	Data management belongs to "everyone". Large deficit of institutional/tacit knowledge of existing data set.	Successful data ownership is indicated by clear accountability, with key users understanding the system and able to troubleshoot issues or extract insights.
Integration project decision making	Documented current decision log with clear consistent prioritized decision-making that does not change based on "who is in the room".	Most necessary decisions are made most of the time, but often informally and with inconsistent documentation and communication.	Decision making is slow, contradictory and riddled with conflict. Under pressure, decisions are reversed.	Success is measured by how quickly decisions are made, documented, and communicated.
ERP customization	Minimal customization, with out-of-the-box functionality meeting most business needs. Customizations are limited to non-critical areas and are efficiently managed.	Moderate customization required for specific processes. Customizations are necessary but contained, often leading to slight delays in testing and implementation.	Extensive customization is required, involving significant development time and effort. Customizations may complicate future upgrades and lead to long-term maintenance challenges.	Successful customization meets business requirements while maintaining system performance and upgradeability. Key metrics include minimal post-launch bugs, and ease of maintenance.
Third party integrations	Few and simple integrations, with standardized APIs or pre-configured connectors. Well-documented and tested integration processes.	Moderate complexity integrations, requiring custom connectors or middleware. Integration may need some adjustments post-implementation but is manageable with moderate effort.	Complex or custom-built integrations, often requiring extensive development and testing. High potential for errors or misconfigurations, delaying overall implementation.	Key metrics include smooth data transfers (as reflected in transactional failures), and minimized manual work. Success is also reflected in the ability of the ERP system to scale and adapt to future integrations without major complications.
Executive sponsorship	A cohesive team of executives and super users from both companies who work well together on a weekly or twice weekly basis to analyze risk, make decisions and communicate change.	Moderate engagement from some executives with sometimes inconsistent agreement and resolution of issues.	Sporadic intervention from a minority of executives most often at points of crisis. Disagreement between functional leads that goes unresolved.	Success is measured by the level of engagement from leadership, their willingness to resolve conflicts, and their role in championing the project internally. A key measure is collective decisions made.

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Resource allocation	Full-time experienced resources with project mgt & application expertise, almost always including third parties for bandwidth, expertise and proven experience. Data resourcing is full time.	Part-time resourcing that places too much burden on already existing super users with limited capacity.	Integration is just one of a number of competing “strategic” priorities that result in unresolved tension, inadequate resourcing and consistently missed milestones.	Minimal project delays, the ability to solve issues rapidly, how long a decision remains open on decision log, and low burnout rates among team members are important indicators.
Rigorous validation	Systematic prioritized approach designed to replicate actual business transactions both functionally and cross-functionally. Documented issues with rapid resolution.	Moderate levels of validation but often not structured or prioritized resulting in holes in validation that only become apparent post go live.	Random, inadequate and undocumented validation often focused on a few key processes resulting in “feelings” driving the go live decision making process.	Accuracy and completeness of transactions post go live.
Third party vendor support	High engagement and timely responses from third-party vendors. Issues are resolved quickly, minimizing downtime or implementation delays.	Vendor support is available but less responsive. There may be moderate delays in resolving issues, causing occasional disruptions in implementation progress.	Poor vendor support with slow response times or minimal engagement. Critical issues take longer to resolve, causing major delays in the project timeline.	Vendor support success is seen in quick problem resolution and minimal project delays due to vendor-related issues.
Hardware/software stack of acquired company	Modern infrastructure with direct access to underlying data sets. Clear documentation of all necessary systems. Access can be granted readily and quickly.	Mixed infrastructure, with some reliance on older hardware or non-cloud-based solutions. Data access may be somewhat restricted and/or “clunky” and user creation/management is slow	Legacy hardware and outdated software, leading to compatibility and/or remote access issues. No clear management or documentation of the legacy system.	Success is measured by the time required to set up users, grant the necessary security access and the ability to extract data on demand.
Change communications	Clear communication plan that is fit to the needs of end users (not executives) and aligns with culture of individual companies. Manages both the informational needs of the project and the emotional course of an ERP integration.	Communication to end users is information only and as required, which is most often not enough.	Communication to end users is infrequent and contradictory and with incorrect levels of transparency (not too much, not too little, just right). Emotional journey of users is actively disparaged.	Success is measured by user engagement and willingness in advance to engage in go live process.
Training	Comprehensive training programs with well-structured learning materials, tailored to different user groups. On-site and remote training sessions provided for all users, ensuring system proficiency before go-live.	Basic training provided, often after the system is in use. Focus is on essential functions, with more in-depth training rolled out post go-live. End-users may rely on self-learning resources and limited support.	Minimal or delayed training. Users are not fully trained until after go-live, leading to confusion and delays. Training is reactive rather than proactive.	Training success is gauged by user competency and adoption. Key measures include user confidence, minimal post-launch support requests, and the ability to use the ERP system effectively without needing constant assistance.