



# Epicor Signature Methodology

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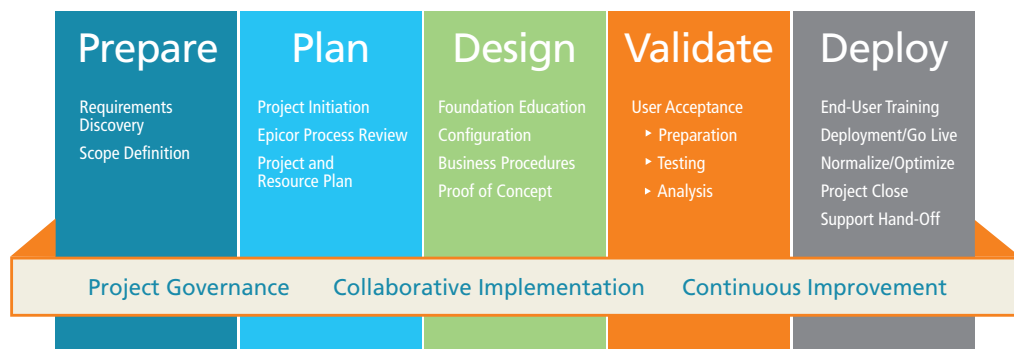


# Introducing Epicor Signature Methodology

With thousands of successful ERP implementations worldwide, Epicor Consulting delivers among the most cost effective and efficient techniques to plan, design, validate and deploy your Epicor solution. Staffed with direct employees around the globe who are properly trained and equipped with world-class implementation tools, Epicor Consulting follows our proven Signature Methodology designed specifically around Epicor software and our customers.

The Epicor Signature Methodology is broken into five stages: Prepare, Plan, Design, Validate, and Deploy. Each stage includes a series of segments that are filled with a set of inputs, tools, techniques, and deliverables all building upon one another to move to the next stage. The methodology also includes built-in sign-off processes to better ensure each party is satisfied throughout the project before moving to the next group of milestones. The end result is an on-time, on-budget implementation of your Epicor solution tailored to bring your business to the next level.

## Signature Methodology





## Prepare

Requirements  
Discovery

Scope Definition

## Prepare

The Prepare Stage is when Epicor Consulting aligns the implementation project expectations with the software suite you are planning to implement. We will also validate that the software you are considering will meet your business needs and explore the right suite of implementation tools and techniques that will meet your timeline and budget requirements. All of this preparation allows you to know upfront exactly what to expect from both the software functionality and implementation perspectives.

## Plan

Project Initiation

Epicor Process Review

Project and  
Resource Plan

## Plan

The Plan Stage is the official commencement for the implementation project. It creates the foundation for the whole project and creates the “blue print” that lays out system requirements, resources, and timelines that are needed to match your business needs and budget. This is when you will begin to work with the Epicor Project Manager to finalize the project objectives and scope and then formally authorize and kick-off the project to your internal teams.

Epicor works with you to gain a clear understanding of the business drivers for the project and the key metrics for measuring the project’s success. Your project core team will review the Epicor Business Process Flows and align them with your current business processes. You may discover process or functionality gaps that will verify if there are any recommended changes needed in your project scope.

You will experience the following items in the Plan Stage:

- ▶ **Project Initiation:** This step establishes the framework for a successful implementation project by setting a communication strategy and project priorities. It unites the team behind a common vision, which prepares the project team for the engagements and commitments that lie ahead.
- ▶ **Core Team Project Launch:** When launching the project to the core team, you will provide a high level overview about the project vision and objectives, the project framework, and the main goals and priorities as it relates to project scope, time, and budget.
- ▶ **Epicor Process Review:** As a standard part of an Epicor implementation, you will participate in an Epicor Process Review (EPR). The Epicor Process Review is a collaborative effort between the Epicor Consulting team and your project team. It is a combination of education, discovery, gap analysis and recommendations. The EPR provides an in-depth look into your business by comparing your current or desired processes against our recommended processes. Our recommended processes are based upon years of industry and technical experience as well as successfully completing thousands of Epicor implementations. Upon completing the EPR, Epicor will make recommendations on how to address any discovered gaps that could include process or software changes.

Epicor offers a number of tools and techniques to assist in determining your business processes. One such tool is XSOL InOrder. This robust Enterprise Process Planning tool helps you visualize, define, improve and implement your new business process which ultimately drives efficiencies and reduces costs. Epicor delivers with its implementations its best practice processes via a number of XSOL process maps. You may use these maps out-of-the-box or leverage your own XSOL InOrder license to create and update your unique processes.

You may also realize through this exercise that your organization will benefit from making some strategic changes due to what is uncovered in the process review. This type of change can be rewarding and successful if carefully planned and executed. Through the Change Acceleration Process (CAP) Workshop, Epicor Business Consulting can help you maneuver around the common pitfalls companies experience when implementing change, creating a faster return on your investment. The two-day CAP Workshop addresses the common pain points found in implementing change and leverages a series of proven interactive tools and brainstorming techniques designed to forecast and mitigate stakeholders' resistance to the implemented change and identify strategies for its success.

- ▶ **Project Management Plan:** The plan outlines the project's requirements, identifies the team's roles and responsibilities, establishes expectations and possible risks, and maps out specific, measurable checkpoints.
- ▶ **Corporate Project Launch:** Your executive sponsor will introduce the project to your corporate organization. The announcement conveys the project's purpose and priority as well as how the project will fulfill your company's business objectives.

By having a sound plan up-front, you can help curb possible inefficiencies and additional costs that could effect your desired return on your investment.

## Design

Foundation Education  
Configuration  
Business Procedures  
Proof of Concept

## Design

The Design Stage is when your core project team and subject matter experts begin to use the system and document how your organization will use the system to meet your business objectives. You will also begin to configure the system and data. This stage allows us to identify and recommend if any embedded tools or customizations would best fit your needs.

You will experience the following steps in the Design Stage:

- ▶ **Foundation Education:** Your core project team begins to gain basic application knowledge on standard system functionality. Epicor has a number of tools and resources available including Instructor-led and self-study courses from Epicor University as well as specific knowledge transfer on your particular environment from Epicor Consultants who are working on your project. This foundation education helps you better understand how the standard Epicor processes fit into your business and allows you to explore the user interface and core business workflows and to understand key data elements.
- ▶ **Configuration:** Before configuring your applications and databases, you will document use cases and end user procedures. This activity gives you the opportunity to dive deeper into the system and focus on how you need to conduct processes so they best fit your business.

Your system will then be configured based on the outputs from the documented use cases and end user procedures. The configuration includes system flag, settings, control records, and representative data sufficient for unit testing.

Clean, valid data is the foundation of any system and provides a stable base for testing and practice on the new Epicor system. Epicor has a number of tools and techniques designed to

convert data efficiently and effectively. This initial data conversion pass will bring selected legacy data into the new system and the conversion efforts will vary depending on the type of system you are transitioning to and from, the data complexity, and your project scope. You will then have the opportunity to validate the converted data.

- ▶ **Proof of Concept:** Validating the newly converted data occurs during the proof of concept testing which confirms your use cases were accurately identified and complete. During unit testing, you will elicit subject matter experts from your organization to test the system functionality for their specific functional area. This type of testing verifies that functionality and use cases in each area are valid and ready to proceed to cross-functional testing.

You will also conduct an end-to-end proof of concept. This type of testing validates the flow of data and documents from one department to another. After this testing, the procedures should be complete and ready for the Validate Stage.

Upon completion of the Design Stage, your core team will be well-versed in using and testing your configured system. This provides the team with the opportunity to confirm that the system meets the applicable specifications before moving the system out to a wider audience for further testing and go-live.

## Validate

### User Acceptance

- ▶ Preparation
- ▶ Testing
- ▶ Analysis

## Validate

The goal of the Validate Stage is to better ensure that all business procedures are correctly documented and that the business operations flow successfully through the system. The Validate Stage leverages User Acceptance Testing (UAT) so that end-users have validated procedures and their training time is maximized and efficient. UAT can take different forms based on the size and complexity of the business and project timelines and scope. UAT may include just your core project team or the entire user base. It may have one or multiple iterations before it is deemed successful and the system is ready to be deployed.

The Validate Stage begins with preparing for User Acceptance Testing (UAT). Thorough preparation for UAT better ensures that the testing is as smooth as possible so that the process can focus on operational gaps and on potential configuration or technical issues. Sound preparation minimizes the time and cost for the overall testing process while keeping it focused on the defined project scope.

After the proper planning, you will conduct the User Acceptance Testing. UAT helps catch any remaining gaps and potential issues so that the procedures can be corrected prior to go-live. This is the time when you will execute test scripts for all identified end-user procedures to verify that all necessary procedures are documented and that the system and hardware are configured properly.

The last step in the Validate Stage is to analyze the User Acceptance Testing results. Your core project team will analyze the results and any issues that were uncovered during the testing. This helps them determine if procedures should be updated or whether new ones should be created. UAT may be repeated if the necessary changes are significant. If UAT was successful, the project can proceed to end-user training.

Upon completion of the Validate Stage your end-users can be confident that the system will meet their needs and the project can proceed to the Deploy Stage.

## Deploy

End-User Training  
Deployment/Go Live  
Normalize/Optimize  
Project Close  
Support Hand-Off

### Deploy

To kick-off the Deploy Stage, you will work with Epicor to establish a detailed go-live plan that helps organize the critical path to a successful go-live. The plan verifies that the required activities are complete and synchronized with the go-live date. With a proper plan in place, you will help mitigate any potential risks and set clear expectations for what is necessary for a smooth go-live.

The next step is to train your end users. This is a critical to the success of your implementation. Without proper training, you run the risk of lower user adoption rates which can lead to costly mistakes and could affect your overall return on your ERP investment. Epicor offers a number of resources from Epicor University and Epicor Knowledge Mentor software to assist you in providing effective end-user training.

Upon completing end-user training, you will be ready to start the go-live process. The team will follow the go-live plan details which include a final pass of converting and reconciling your data from the legacy system. Prior to go live, the team will also conduct application and technical audits to confirm everything is interoperating as planned. During cut-over, the core team will provide go-live support and the project managers from your company and Epicor will be monitoring the process to better ensure success.

Once live on the new system, it becomes a part of your company's daily activities as users acclimate to the new procedures and processes. During this period of significant change, Epicor will continue to be available to provide support and the project will remain open until your business operations are normalized. The Deploy Stage is not complete until Epicor works with you through your first month-end to help you confirm that all parts of your new ERP system are operating as designed.

Congratulations! Once the post go-live activities are complete, you will successfully graduate from the system implementation project and it will be officially closed. Epicor Support personnel and your account team will be available for any ongoing questions or support you may need. By leveraging our Signature Methodology, Epicor has put in place the processes, tools, and experience to deliver on-time, on-budget ERP implementations tailored to fit your specifications.

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## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit [www.epicor.com](http://www.epicor.com).



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