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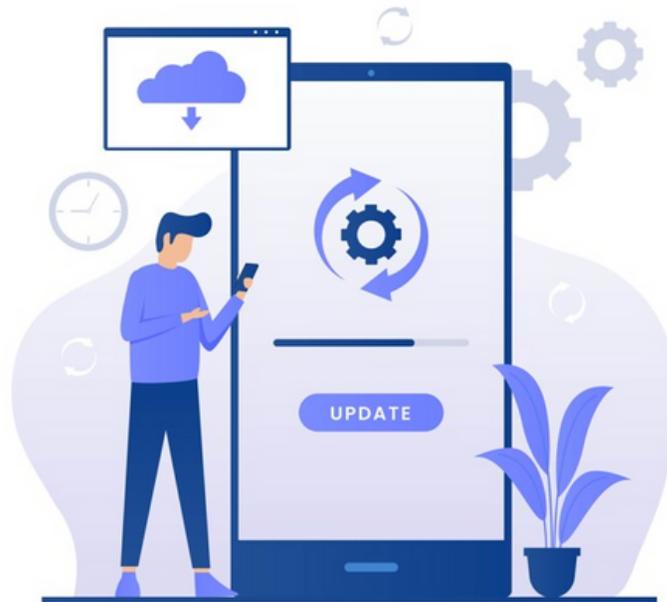
**Customer Success  
Guide Series**

# **ERP Upgrade**

## **The Do's And Don'ts Of an ERP System Upgrade**



**Swipe Left**



## **Do: Assess the long-term goals of the ERP system upgrade**

**Make the most out of your ERP system upgrade by measuring the value and benefits the new system would bring about in your organization beforehand.**

Start the process of upgrading your company's existing ERP system by delineating the long-term goals you would want it to fulfil. This way, your ERP partner will exactly know the services that must be embedded in the system to boost the overall efficiency and maximize ROI. Once the implementation is successful, it is important to track its effectiveness and get it validated by the plan that was initially rolled out. By identifying the impacts of the upgraded ERP system on the ROI, your company could derive a transparent idea about similar projects in the future. Even though gauging the success of this implementation might take time, a detailed picture of this scenario can help the business recognize the advantages.



## Don't: Overthrow Your Existing Data

Do not let go of your existing data by replacing your legacy systems altogether.

Replacing your prevalent ERP system shouldn't be considered as an option while upgrading the software. If needed, the data retention laws of your company should be reviewed to recognize the opportunities of data transition to a cloud platform. However, if the data is not migrated to the new ERP system, there should be a one definite location for storing those important pieces of information. Depending on how the users of the business want to access information, the databases should be either stored and maintained in the legacy systems, migrated to the cloud or moved entirely to the new system. This is why tech experts are often of the opinion that companies should upgrade to ERP systems that are capable of automatically pulling up and syncing files from the traditional software.

# Do: Integrate Business Intelligence Tools And Applications

Surge the data gathering and storage capacity of your ERP system by integrating them with BI tools and business applications.

Capitalize on the benefit of capturing more data than ever by integrating your company's BI tools and business applications with the upgraded ERP system. ERP software like Microsoft Dynamics 365 can seamlessly bring together data from all the channels connected to it and organize them at a single source of truth. The data can be then updated and shared by the users through real-time reports and dashboards to ensure there aren't any errors or redundancy. In order to make use of data in the right way, it is crucial to draft a strategic data mining process. When BI and analytics tools work together with a powerful ERP system, creating a data-driven culture in the business and devising smart decisions become easier.



ERP should be able to take the best of the business processes and bring them together under one system, while letting everyone in your organization view the same information.



A solution doesn't have to be an all or nothing proposition. Software solution modules can be purchased separately depending on your business needs.



Any ERP solution you choose should work with what you're using now but also include features that can help in your future growth.



## **Don't: Choose a Random ERP Implementation Partner**

Upgrading your ERP system will come with higher chances of success only when you have an experienced and trustworthy implementation partner guiding you through the process.

Owing to the fact that ERP systems have now become an indispensable part in every company's strategy for growth, there are innumerable technological experts out there offering their services to set up the solution. Nevertheless, in this day and age of personalization, agencies that follow the one-size-fits-all policy for going about this journey should be a big "no no". Seek assistance from experience service providers who are interested in being greatly involved in this process of transition and will guide you from outlining the solution to deploying and maintaining it. Apart from configuring the solutions, a reliable ERP expert can help you spot opportunities for improving operational efficiency in the next few months and build strong customer relationships.



## **Do: Take a Digital Readiness Assessment**

**Before implanting a list of services in your ERP system, take a digital readiness assessment to identify and bridge the gaps in your company's technological framework.**

Ask your ERP service provider to prepare a digital readiness assessment for your business so that you know your employees and the IT system are in a position to take advantage of this upgrade. Depending on your company's goals and visions, delineate different metrics to estimate the current status of each of the digital tools that you currently use and your workforce's proficiency with the same. Chalk out the gaps in your existing digital infrastructure and find out if those can be bridged by your new ERP system. The objective here is to achieve more with less. Therefore, a robust ERP solution that can be customized to accommodate the changing demands of the company from time to time would indeed be the best recourse.

# DIGITAL TRANSFORMATION PARTNER

## Applications | Automation | Analytics

Tech Falcon LLC is a digital transformation partner for enterprises as they embark on their digital transformation journey. We are headquartered in Dubai. We help clients in manufacturing, projects, distribution, public sector, real estate, and public sector to achieve business and operational goals with business applications, automation, and analytics services.

### Contact us:

Office No 125,  
Al Ferdous 4,  
Al Wasl Road, Dubai.

Phone: +971 45 965 555  
Email: [info@techfalcon.ae](mailto:info@techfalcon.ae)  
Website: <https://techfalcon.ae>

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