



PROBLEM STATEMENT:

The implementation of the Enterprise Resource Planning (ERP) system did not suffice business needs and as a result the organisation was not utilising the system effectively.

Client profile

- Financial Services Industry
- \$227 Billion Funds Under Management
- +2.3 Million Members
- +1,000 Employees

Key Team Roles

- Program Manager
- Functional SMEs
- Project Managers
- System architects
- Developers

Business Impact

- ERP system now being utilised by Finance & other departments
- Operating model designed to identify the root cause of issues as they occur to determine if related to system, process or training and plan is put in place each month
- New vendor relationships in place to deliver the required outcomes
- Minimal noise around the ERP system
- Reduced rework in payroll by 45%, and error rates by 25%

Due to the system's inability to meet the company's existing functionality requirements, the business avoiding using it because no new processes were implemented for the new system. This created manual work-arounds which resulted in increased errors, inefficiencies through duplication and an incline in labour intensity. The business was utilising 400% of support hours per month and payroll error rates were high.

Approach: Whiteark was asked to help remediate issues with the ERP system to ensure the required functionality was enabled. Our approach to the systems optimisation involved 3 phases: Fix, Optimise and Build for the Future. All 3 phases needed to be run concurrently even though the predominant focus was Fix, it was critical to the success of Phase Fix to have the end state in mind; therefore, the design of the future build was fundamental. Key steps:

- High level view of current state process from end to end
- A root cause analysis to uncover the reasons for the system not being utilised correctly was due to issues with the system, process or people
- Define key problem statements, what success looks like and agree on the end-state view
- Build future state processes and enhancements that need to be made to the system
- Map out a step change plan to meet business critical deliverables in the short term
- Develop a program plan to deliver an improved outcome
- Develop an ongoing operating model to support the business with the ERP
- Identify measures of success

Solution:

- Identified the root cause of the issues and developed a program plan to deliver an improved outcome over 6 months – the plan included required changes to the system, process and people
- As a matter of urgency all high priority issues were resolved within 8 weeks
- Developed end state processes and defined enhancements required to be made to the system
- Established and integrated an operating model to support the business with the ERP
- Changed the policy, process and systems configuration for payroll to minimise error rates by 25%
- Identified success metrics to track the effectiveness of the system optimisation

PAYROLL ERROR RATES

-25%

YEAR ON YEAR

HIGH PRIORITY ISSUES

8 weeks

TO RESOLVE

REWORK

-45%

YEAR ON YEAR