Implementation Methodology

The ultimate guide to successfully implement Odoo projects.

Table of contents

00

Introduction

Introduction

As Project Leaders our job is amazing: **we have the opportunity to improve people's lives at work** by automating boring tasks and making companies more productive. It is rare to find a solution that has such an impact on the people using it.

But implementing a management software is **as difficult as it is impactful**. Odoo connects all departments, which means a lot of changes and a lot of users relying on you to improve their workflows.

It's hard to be a great Project Leader... very hard. More than 50% of proprietary ERP implementations fail and only 18% of SMEs have deployed an integrated management software, because it's too complex and too expensive. But the constant failures to deliver are actually our opportunity to thrive.

By making implementation projects smooth, predictable and affordable, Odoo is transforming the market. Over the past 5 years, more than 95% of our implementations have been successful, which stands in stark contrast to other solution providers.

To reach this point we took a critical look at our approach and at the role of our 300+ Project Leaders. We fine-tuned our methodology, analyzed how the top performers behaved, and realized what makes some projects more successful than others.

This guide summarizes our best practices and all the tricks we have learned.

01

Key concepts

Responsibilities

- The priority is to ensure the project stays on schedule, and on budget.
- The customer defines his business' needs (the why and what). But you define how to satisfy these with the product (the how).
- Odoo challenges customer demands to ensure the benefit is worth the cost.

Keeping It Simple

- Decide, so that the customer does not have to: his role is to challenge you.
- Limit the number of stakeholders to accelerate decisions.
- Limit custom developments to the minimum necessary.

People

- Project Leaders must be problem solvers, product & business experts, as well as Digital Advisors.
- Avoid intermediaries who are not decision makers.
- Train the key users early on in the project. They need to be confident in the product and committed to the project.

Project Managers

- The key success factor of any implementation is the Project Manager (aka Project Leader at Odoo[1]).
- Recruit & train the best talent and retain only the top performers.
- Even the best Project Leaders miss critical details. To limit risk, Odoo Experts should challenge their work at critical steps throughout the project.

But never forget:

COMMON SENSE ALWAYS PREVAILS OVER ANY RULE!

[1] See chapter 3. Roles

02

What is a Successful Project?

ABNASIA.ORG

As a Project Leader it is difficult to find the right balance between satisfying the customer, accepting more change requests, keeping the budget low, sticking strictly to agreements, spending more or less time on analysis, aligning with the project schedule, etc.

The priority for a successful project is to onboard users onto Odoo, on time and within budget. When a project fails it is always because it took too much time, or costed too much.

Timing and budget are the key elements in structuring your methodology. The rest is secondary:

- Developing custom features is not a priority.
- Customer satisfaction during the implementation is not a priority.
- Early service upsell is not important.

Develop custom features at last resort

Custom development always creates additional costs and drags out the implementation project, sometimes to the point of putting the project at risk[2]. It leads to technical debt that the customer will have to pay for within the coming years in the form of additional maintenance and upgrade costs.

Each customization may seem simple and affordable, **but the complexity of a project grows exponentially as the number of customizations increase, not linearly.**

A project is successful if it is delivered on time and on budget. Developing custom features for the customer's specific needs does not make the project successful, but it is sometimes necessary in order to support the customers' core business.

2 https://news.ycombinator.com/item?id=17541092

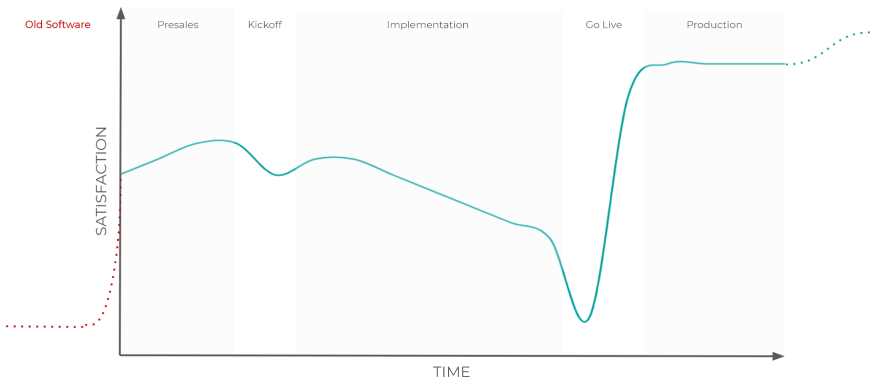
Customer satisfaction is not a useful KPI

Customer satisfaction is not a good measure of the success of a project. First, it evolves constantly throughout the different phases of a project. Second, each person working for the customer might have different expectations, for example: a key user wants additional features, but the CEO wants the project to be on time and on budget.

Focusing on customer satisfaction distracts the Project Leader from the project's main objectives. **We prefer our customer to be temporarily dissatisfied** (because we argue on their requests) **than missing the implementation deadline.**

Even though customer satisfaction is not a goal during the implementation it is still a good way to evaluate the motivation of key users.

Therefore, we use periodic customer ratings to know which customers require more attention (and not to assess the quality of a Project Leader).



Customer satisfaction evolution throughout the project.

Selling extra services before "Go-Live" is not a priority

Service companies want to bill the customer as much as possible. It is their core business after all! Large service companies even have complex methodologies that lead to needing more services, like a large analysis phase to mitigate the risk.

We believe that selling more must never be an initial objective. Our company's growth needs to be the result of quality services, and happy customers. We think it is better to deploy customers in fewer days. Not only it reduces the risk of a project's failure, but it also makes us more competitive in the market.

Keeping a good pace throughout the project is a huge competitive advantage in acquiring new customers. Then, as you build your customer base, it becomes very **easy to sell extra services to existing customers:**

- It is 7x easier to upsell existing users than it is to acquire a new customer.
- You can always divide the project into phases and sell non-mandatory features after the "Go-Live". This way, you will never need to squeeze your margins because the budget is consumed.

Long story short; **to achieve sustainable growth, focus on the project's success**. If you have successful projects, customers will buy more services later on. Every time you upsell before the "Go-Live", you weaken your customer's trust; they might think twice before paying for additional services in the future.

A few years ago, I interviewed 15 customers to gather feedback about our implementation methodology and services. Here is what one customer told me of their experience with an Odoo consultant: "During the first 3 months, I didn't like working with Frédéric [the Project Leader]. He was constantly questioning everything I asked for, to the point that I had the feeling I was wasting my time. It was a bit frustrating.

But, later on, I understood it was for the good of the project. He often found better solutions than what I asked for during the implementation. Now, even though we are in production, everytime I have a business decision to make on a process, I call him first to get his advice."

This story perfectly illustrates our approach: by prioritizing the success of the project over the short term customer satisfaction, we actually make customers happy in the long term. Frédéric could have agreed to develop every custom feature the customer had asked for to make him happy at first, but the project would have cost more, been delayed, and we would have been at the risk of losing the customer.

- Fabien, Odoo Founder

"Go-Live" at Industrial Taylor: Michaël, Project Leader with warehouse operators.

03

Roles

Traditional ERP vendors define different roles for analyzing business flows: Project Managers, Junior Business Analysts, Senior Business Analysts, Testers, Trainers, etc. But too many cooks spoil the broth!

Making the right decision always involves a trade-off between specific business needs and existing product features. If you split the role of business analyst and product expert you run the risk of making inefficient decisions.

Odoo, as a product, is much easier to use than traditional ERPs. This allows for one-single person to know both the business and the product - something competitors cannot do.

Odoo: The Project Leader

The Project Leaders are the main decision makers of the project. They play the role of project manager, business analyst, and digital advisor.

As project manager, **we lead the project** by:

- Ensuring the implementation is on time.
- Onboarding the SPoC (Single Point of Contact) on the project.

As business analyst and product expert, **we keep things simple** by:

- Deciding how to implement specific needs.
- Challenging the customer’s demands and managing their expectations.
- Configuring Odoo.
- Migrating the required data.
- Writing the specifications (if any development is required).

As the digital advisor **we focus on the why** by:

- Identifying the key challenges of the customer.
- Rethinking the customers business in terms of digital opportunities.

The Odoo Project Leader has so many hats to wear, they have to be considered as the key point of contact by the customer throughout their implementation.

Odoo: The Project Director

On larger implementations, or highly political environments, a Project Director is assigned in addition to the Project Leader. While the Project Leader focuses on the implementation, the Project Director helps present the project and manages the executives' expectations with a high-level overview of the project.

Their role is to keep the decision makers informed and committed to the project by:

- Reporting the project's progress to the steering committee.
- Tracking the efficiency of the project.
- Offering solutions to fix inefficiencies on how the project is handled (on both sides).

As opposed to the Project Leader, the Project Director might not work full time on a project, but rather oversees it from start to finish. On smaller projects this role is usually done by one of the Project Leader directly.

> *For a large publicly traded company we had a mission to deploy a full scope ERP for 3000+ users, in the middle of a complex merger between two companies.*
>
> *We started by following their way of managing the project. Being an experienced service company they wanted to teach us how to do things. But after a few months, the project started to slip.*
>
> *I suggested a new approach to the steering committee, one which aligned more closely with our methodology. We changed the mechanics in place to do it the Odoo way:*
>
> - *Working directly with a SPoC and giving weekly demos (only one person decides, no more committee).*
> - *Challenging every request to determine if it can be dropped or done in another way (stick to the standard environment as much as possible).*

- *Saying No! to non-rational time consuming requests.*
- *Bypassing most of the project team members to get the decision makers involved directly (avoid wasting time in validation cycles).*

At first the customer was frustrated (after all we, a young team, challenged the way a big and experienced company was managing projects), but as the project moved forward, the executives were very happy and we met their deadlines!

- Grégory, Project Director, Odoo BE

Odoo: App Expert

For key applications (Finance, Inventory, Marketing, Manufacturing, Website, etc...), the most knowledgeable person of the app plays the role of the Odoo App Expert. They have developed deep functional knowledge in industry specific Odoo features and have acquired solid business experience.

The App Experts are not part of the project. They perform peer-reviews, working across all projects of the company. In addition to supporting business analysts on complex issues, their objective is to **reduce the volume of custom developments in projects**. To do so, they review ROI analyses by providing smart solutions on standard, challenging the "Must Have"/"Nice to Have" or phasing split, and ensure we don't develop things that are not really necessary.

Odoo: Developer

Not all projects will require a developer. Most small companies (<50 users) use Odoo out-of-the-box. However, Odoo Developers will be involved if, and only if, the business has a need that results in a specific development.

The main point of contact of developers is the Project Leader (not the client), as he needs to challenge development requests.

Odoo: Web Designer

Web designers can provide design, development, and training services to Odoo clients and partners within the website app scope (Website Builder, eCommerce, Blogs, Events, Portal, eLearning, etc.). They ensure that the client's website not only looks attractive but also runs efficiently.

They work directly with clients to understand their branding and business objectives. While they always prioritize the use of standard features, they can also carry out specific developments to meet particular design needs or include advanced features, resulting in a tailored solution. In any case, clients can still easily update their websites on their own after the go-live.

Customer: The Single Point of Contact (SPoC)

Acting as "super key-user", the **SPoC has a 360° understanding** of the project requirements by:

- Gathering and assessing the project requirements.
- Training the end-users with the support of the Project Leader (there is no better trainer than a colleague who knows your internal processes).
- Becoming an internal Odoo expert and ensuring the first level of support for their colleagues.

In sharing the responsibility of the project’s success with the Project Leader, we expect the SPoC to get involved in every step of the project. Therefore, we need the SPoC to:

- Be available for the project.
- Have the authority to make decisions.

Customer: Extra Roles

On large projects, extra roles might be defined:

- **Steering committee:** a committee (composed of the customer's decision makers and Odoo's Project Director) that decides on the project’s priorities, methodologies, and tracks the success of the project.
- **Key-users**: in addition to the SPoC, the key-users act as experts in their

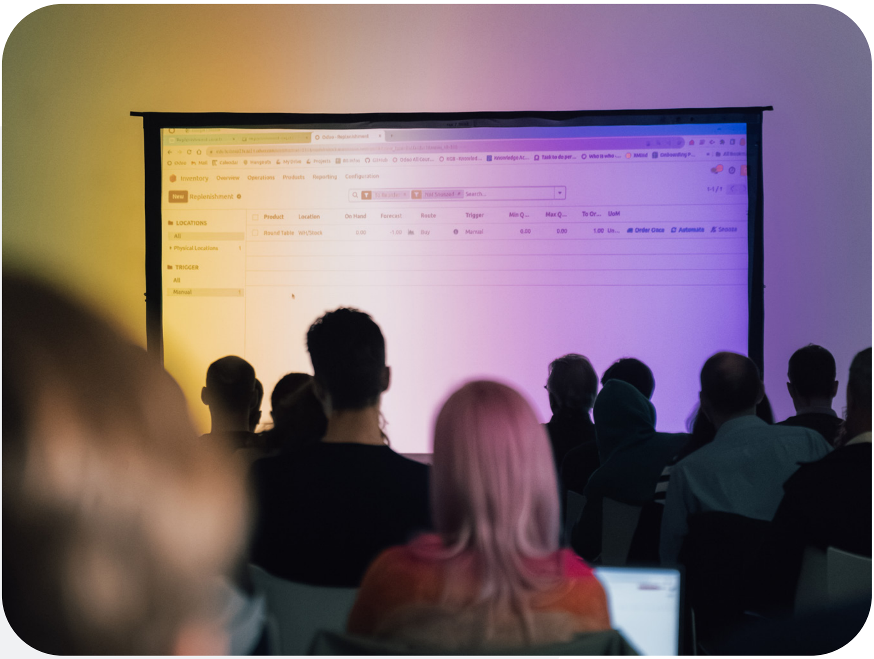
specific domain and will help the SPoC define their requirements. They also test and validate deliverables.

- **Sponsors:** usually the CEO or CFO, who pay for the project and have high-level objectives. They're usually part of the Steering Committee as well.

> *Two years ago I started working on two projects, each one with a different manufacturing company with similar flows owned by the same person. At the beginning of the project we had two SPoC's, with the first one being the operational manager of one of the companies, and the second was the CEO of the group.*
>
> *The first implementation went very well. In a few months we went full scope into production, all thanks to having a good collaboration with the SPoC. On the contrary, the second implementation was very difficult to manage due to the CEO's (acting as SPoC) unavailability.*
>
> *We decided to change the SPoC but the CEO didn't trust this person. Every decision had to be validated by the CEO, which was adding days to the process. Discussions with the new SPoC were good, but he had no authority. The project was a nightmare and it took months to implement the first phase.*
>
> *After the first production launch we decided to change the SPoC again. The person responsible for the implementation in the first company took over the responsibility to implement the second company for the next phases. The CEO trusted the decisions he would make and no validation was needed. Things started to move forward much faster. Just by improving the decision making process we increased efficiency.*
>
> **- Benjamin, Project Leader, Odoo BE**

04

Implementation Phases

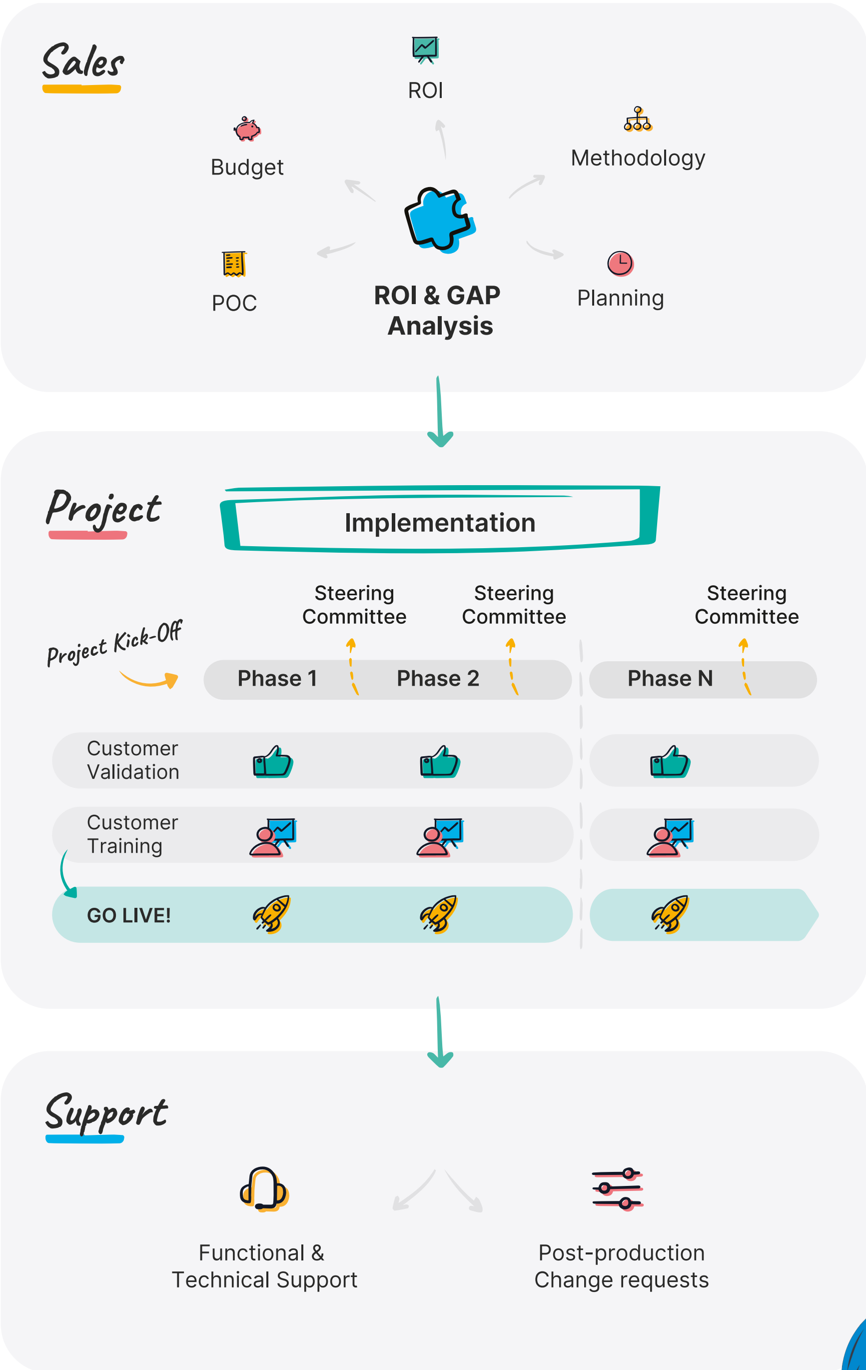


The phases of an implementation project and their relative durations are:

Phase	Time	Goals
ROI Analysis	10%[3]	ROI analysis, phasing & budget.
Kick-Off	5%	Align stakeholders on methodology + standard training.
Implementation	80%	Series of cycles: analysis, development, validation, key-user training.
Go-Live	5%[4]	End-user training, bug fixes.
Second deployment	variable	Broaden scope or add custom features.

Renee deployed 7 Odoo apps to organize the production of branded products at Inproma.

[3] For most SME's this step is wrapped up in the Kick-Off phase since performing an ROI is not justified.
[4] The Go-Live might require more time in larger projects (from 10% to 15%) due to heavier change management.


Sales
ROI
Budget
Methodology
POC
ROI & GAP Analysis
Planning
Project
Implementation
Project Kick-Off
Steering Committee
Steering Committee
Steering Committee
Phase 1
Phase 2
Phase N
Customer Validation
Customer Training
GO LIVE!
Support
Functional & Technical Support
Post-production Change requests

ROI Analysis

On large projects the ROI Analysis is sold before the customer commits to the whole project and budget. Depending on the size of the project it can take anywhere from 5 to 80 days to complete. On small projects (<4 months) the ROI analysis is not a distinct phase, but performed during the Kick-Off phase[5].

The ROI analysis allows the customers to:
- Get a precise plan and budget.
- Assess the Return on Investment (ROI): Cost/Benefit analysis.
- Review their specifications according to the software.
- Resolve any doubts about the project's feasibilityassess the Project Leader and their team's capabilities.

The Project Leader delivers:
- An analysis of the cost savings and benefits for the customer (the Return).
- A budget and an implementation plan (the Investment).
- A map linking business needs with product features.
- A proof of concept (POC) via product demonstrations of key business flows (or mock-ups to illustrate them if a demo is not possible).

The phases of the ROI Analysis:

1. **Meet stakeholders:** define the objectives, motivations, and risks in the ROI Kick-off (Appendix A) mindmap.
2. **The "Show me how you work" workshops (the "as is"):** work with key users per department to understand how they currently work:
    - Review all workflows in their current systems (with screenshots & recordings), and get samples of each report.
    - Identify current pain points.
    - Map customer needs and terminologies with Odoo ones.
    - Gather data to prepare the POC: product names, bom, ...
3. **A Peer-review** performed by Odoo Experts and developers to challenge the suggested solutions.
4. **Presentation of the POC:**
    - Configure a few business flows, selected by the stakeholders.
    - Demonstration of the solution.

[5] We use the templates provided in chapter "8 Extra Reference" only for actual ROI Analysis (larger projects).

5. **Final presentation** to the customer by using the ROI-Closing presentation.

As you start a new ROI Analysis, expectations are high: everyone wants to discover Odoo, participate in meetings, etc. The key is to set expectations right during the stakeholders meeting:

- Clear definition of the scope, and stakeholders expectations.
- Align on the methodology.
- Explain clearly the next steps of the ROI.

Everyone expects to check if Odoo will satisfy their needs, and express their "to be" objectives. But the first phase is about "gathering the information": the "as is". To avoid frustrations, be sure you set expectations right: explain to them the phases of the ROI: they'll get a presentation that answers their needs during the presentation of the POC, after the workshops.

Analysis Tips

- **Don't focus on the "to be":** they are nice-to-have (not mandatory), and too specific to their current software: the "as is" and pain points are more valuable.
- **Use mind map** templates to take notes during meetings: it helps organize terminologies, current features, pain points, ...
- **Be a salesperson.** As the project is not sold yet! At this stage, your goal is to reassure people and motivate them: demo key features if needed.
- **Capture as many screenshots and recordings** of their current solution as possible. **Get samples of needed reports and data.**
- After reassuring the key users on the project, **assess how they spend their time** (X% on this, Y% on that); this is a key element to assess potential returns.
- **Observe how they currently work:** ask for demonstrations of their current software and get a copy of each document they use. The current situation is more important than their future goals, as it defines the minimal scope to be covered. If you perfectly understand how they work today, you will be able to better challenge their requirements and spot their inefficiencies.
- **Identify the key users' pain points.** Use the ROI Analysis template to get ideas of the most common pain points per department.
- **Find solutions for each problem,** try to stick to standard solutions as much as possible. It is not required to do everything key users ask for, their demands need to be challenged.
- **Never present different options to the customer:** as the Project Leader

you have to suggest the best one and make the decision yourself. The customer's role is to challenge what you offer, not to decide what to do.

- **Avoid having the customer decide whether a feature is "necessary"** or "optional" or everything will be mandatory. Make the decision for them by classifying items as "optional" when you think they need to be excluded from the scope. The customer's role is to challenge your proposition.
- **Clean up your mind map** right after the workshop (at last, the next day): mark what's development or standard, key pain points, etc.

After the workshops:

- **A peer-review** is organized with an Odoo Expert who is external to the project. They are not influenced by the customer and can easily make harsh decisions and provide criticism.
- **The goal** of the peer-review is to:
    1. Assess if custom development is really needed and if so, prioritize it in order to **reduce the budget and planning period.**
    2. Check to make sure you did not miss any key pain points common to their industry, and review the quality of the analysis and gauge the overall feasibility and cohesiveness of the solution proposed
- **All necessary development needs to be divided into two categories:**
    1. Development that is absolutely necessary before going into production (i.e. you cannot operate the business without it).
    2. Development that can be rolled out during a later deployment phase, after the project goes live (i.e. you can operate the business without it, but it is not optimal).

At the end of the ROI:

- **Summarize your analysis** (functional and business coverage, resources required on both sides, planning and risks).
- **Organize specific demos** to reassure the stakeholders and point out the benefits they will get from using Odoo. If a demonstration is not possible, prepare mock-ups (feel free to use Studio) to illustrate key custom solutions.

Toolbox Ready-to-use templates

→ **ROI - Stakeholder Mindmap:** https://xmind.ai/share/qmMDf087

→ **ROI - Workshops Sample Mindmap:** https://www.odoo.com/r/roi_key_user_intw

→ **ROI - Analysis Tool:** https://www.odoo.com/r/roi_analysis

→ **ROI - Closing Presentation:** https://www.odoo.com/r/gap_closing

Project Kick-Off

The goal is to generate buy-in within our customer's company, manage their expectations, come to an agreement with our methodology and, above all, build a solid plan!

- The goals of the kick-off are to:onboard the SPoC on the methodology, and align our vision.
- Perform a quick ROI Analysis to validate the project's feasibility (if not done already).
- Finalize the project plan (scope & phasing) and check budget's expectations.
- Onboard the SPoC and make sure they invest time to learn Odoo.

> *I once was assigned a new project for a company called "Electronics123". The message from the salesperson went along these lines of: "This customer ABSOLUTELY NEEDS his Warehouse, Manufacturing, Purchase, Sales Management and Website/eCommerce up and running in 2 weeks. His Netsuite contract ends then and he will be left without a system." I had only 12 calendar days to migrate his full ERP into production.*
>
> *Here is what I told Johan, the CEO, during the kick-off meeting: "First, the project is impossible. We will fail. We*

usually need 2 weeks per app. But if there is only one tiny little chance to make it work, we have to do this: 1) We go full standard, 2) You do what I say and you don't ask questions since I won't have time to explain every single decision I make". He agreed.

We worked night and day together for the next 9 days. He explained his business processes, and I made all the decisions myself while I was configuring the system. The company went into production 9 days later during the night, on all apps. One of the best projects and customers I ever had.

I can't stress enough the importance of the kick-off meeting. This 'impossible' project was made possible only because the expectations were set correctly during the kick-off. Also keep in mind that project managers should not be afraid to make decisions on behalf of the customer, it makes the process much easier. The customer's role should not be to decide what to do, but to approve what you suggest.

- Laurence, Project Leader, Odoo SF

Kick-Off Tips

- **Tackle issues directly**: if you think the planning is too short, negotiate a delay and ask to push the deadlines asap. Similarly, if you detect a misunderstanding about feasibility, mindset or features, discuss these asap, rather than delaying and avoiding the conversation. Inexperienced Project Managers tend to avoid difficult discussions, which is a common mistake.
- **Check the customer's involvement:** ensure the right people are involved on the customer's side. Ensuring that they have enough time and knowledge to fulfill their duties.
- **Invest time in training the SPoC:** introduce them to the eLearning platform, the online documentation, and train them on key business flows. They will not be able to perform their duties if they do not become an expert of the product themselves.

- **Manage the customer's expectations:** this is a key skill of any Project Leader. Do not set deadlines that are too short, do not promise complex features, do not say the change will be easy, and do not say yes to everything. In short, if you promise less, you over deliver.

I have 2 stories illustrating the importance of following these rules.

Case 1: Failed implementation

My customer knew exactly what he wanted. Instead of challenging them from the beginning, I accepted everything because he could afford it. Big mistake.

Today, the maintenance costs have started to burden the customer. He keeps asking for additional development. Hey doesn't understand why I started saying no and now he's not open to alternative (standard) solutions.

As a result, the project has been delayed for several months and I have to admit that the level of satisfaction is not good.

Case 2: Successful implementation

I began the project the other way around by setting the right expectations. I explained to the customer that I will say no to any development requests unless the need is a justified "must have" and there is no appropriate workaround.

Doing this changed everything. The customer is really open to my suggestions and we saved 100 hours of development by using standard workarounds.

- Audric, Project Leader, Odoo BE

Toolbox Ready-to-use template

→ **ROI - Kick-off:** https://www.odoo.com/r/roi_kickoff

Implementation

No matter the level of complexity, the project must constantly move forward. Keeping a steady pace is a key success factor and the best way to maintain a high level of involvement from the customer, is to keep the SPoC engaged with everything.

After the Kick-Off phase, the designed solution has been demonstrated to key users. It is now time to make it come to life!

Within each phase, the project team works in short cycles in order to deliver functionalities every week. The solution is shaped progressively throughout the phase and validated by the Project Leader and the SPoC. The configuration, data import, and specific development, is handled in parallel by the Project Leader and the Developer, if required.

Configuration

The Project Leader configures the software themselves, including customization with the Studio app, but no custom development. Once the apps are configured, the Project Leader involves the SPoC and key-users through a series of training sessions in order to validate the setup.

Data import

Depending on the volume and complexity of data to import, this task is handled either by the Project Leader or a Developer. Following the Project Leader's instructions, the SPoC and the key users gather the data and prepare the file for import.

The data migration from the current software to Odoo can generate delays and requires making the right decisions:

- **Do not delay the launch to production due to data quality:** Importing the cleanest data possible is optimal, but not at the cost of delaying the project. So, if your customer did not clean it on time and was already using their data in this state, do not delay a launch to production to clean it. Some cleaning can be done directly in Odoo during post-production.
- **Import master data and avoid the full history (if possible):** it takes a lot of time and money for very low long term ROI.

Specific development

The Project Leader is responsible for the success of the project. Therefore they are also responsible for deciding if custom development (which risks delaying the project) is worth it or not. It is never too late to question if a specific development is a must have. Remember: the more you cut the amount of development, the better.

At this stage, the Project Leader approves what needs to be developed; usually that which is necessary to operate the business, not the things that are simply "nice-to-have" (you can operate the business without them, but it is not ideal).

The Project Leader writes the specifications, including the scenarios to be tested, and the SPoC attests to the conformity with the business requirements. Then, the developer takes over the task and completes it. They are also responsible for the automated tests.

The Project Leader tests the new features and makes sure they integrate well within their workflows and do not interfere with the other features or applications. Once the development is validated, they train the SPoC and key users.

The SPoC also has the responsibility to test and validate the development. If issues are detected, they inform the Project Leader who then communicates the feedback to the developer to then fix the bugs and/or make the necessary changes.

Validation & End-Users Training

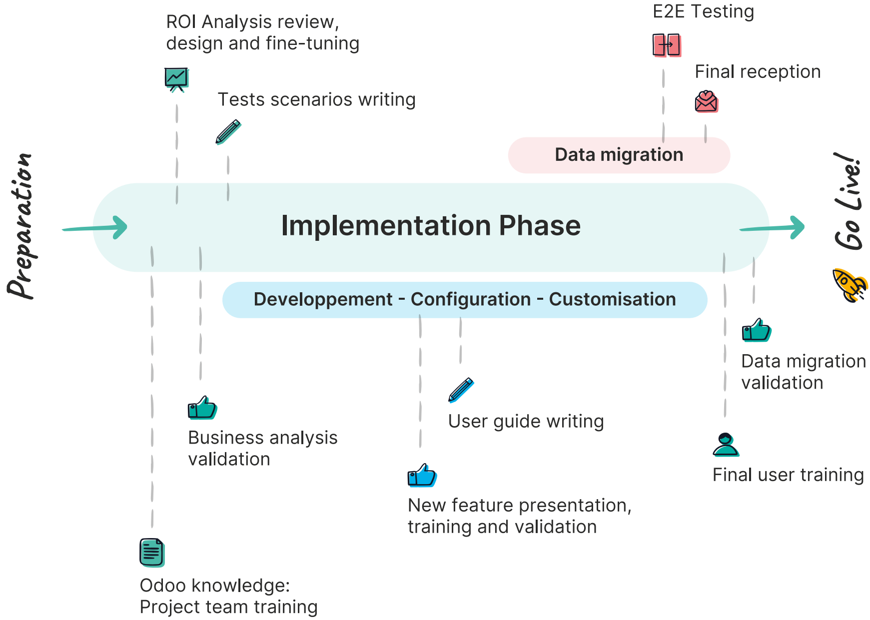
Once all the requirements of a phase have been completed, the SPoC is responsible for all the final tests and gives the green light to go live.

As internal Odoo experts, the SPoC and/or the key users organize and train all the end users.

Similarly, writing the user manual is the responsibility of the customer, as good documentation needs to match the customer's internal processes and terminology. Additionally, having the customer write the user manual is a good way to ensure they have fully tested the software in "standard practice" before going into production

Implementation Tips

- **Ask the SPoC to test the business flows themselves.** They will learn faster this way. You can guide them, but **they must be in the driver seat, using their mouse and keyboard**. This changes everything in regards to training efficiency and their involvement. You will also quickly be able to determine if they do not understand some key concepts.
- **Transform your project plan into a series of quick wins:** To keep your customer involved in the project, deliver regularly. If users start to use the system, even if it is with a small portion of the scope, their knowledge of the system will improve quickly.
- **Keep challenging your customer:** the more you stick to the standard, the faster the implementation will be (and, thus, the risk of failure lower).
- **Do not do something you are not convinced of:** the salesperson's promise can be rediscussed. A contract is less important than the project's success. You can always convince a CEO to not implement an idea (even if it was in the initial contract).
- **Conduct face to face meetings.** It is a great way to unlock complex situations: fear of change, need for reassurance or lack of involvement.
- **Control how the change management is handled:** In terms of change management, your customer is supposed to implement their communication strategy and to prepare the training for their end-users. Your role is to check-in regularly to ensure that everything is going well and to help them adapt it to the reality on the field.



Classic Implementation Journey

Go-Live

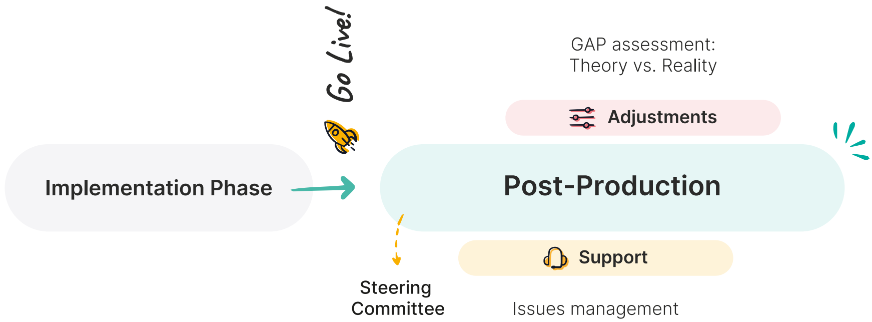
When it's time to turn on the switch you may be faced with unexpected issues. Typically this is due to one or both of the following:

- **The database is not fully tested:** do your best to ensure the key users have fully tested all business flows.
- **The users are not well trained:** if the training was completed months ago, they might have forgotten what they learned. If they did not practice enough during the training they might have missed some critical steps.

Go-Live Tips

- **A training is not a conference.** Encourage the SPoC to have key-users perform the flows themselves, with the SPoC's guidance.
- **Key users are not professional testers.** Quality testing is hard, so they are likely to miss key issues. Make sure to cross check risky parts alongside them.

- **Create momentum.** People need to be excited about adopting a new system and eager to use it. Nothing kills a go live attempt like people who are not looking forward to using the new tool.
- **React quickly.** It is ok to have issues, if you fix them quickly enough.
- **Avoid delaying the Go-Live date.** Although it may feel like the best choice at the time, a lot of things can change in 2 months: people can lose motivation, new change requests will appear, the data import may need to be done again, etc. Pushing back deadlines exposes the project to extra-risks and additional costs. It is usually better to Go-Live quickly, even if everything is not perfect.
- **Be on-site for the first few days** of deployment if there is resistance to change amongst the users. You will need to coach them.
- **After a few days, check if they really went live.** Sometimes clients continue to use their old software out of frustration, fear, or laziness: habits are difficult to change!



Classic Go Live & Post-production Journey

Second Deployment

A month after the initial deployment, the Project Leader reviews the list of the remaining developments that were not launched during Phase 1 (i.e. development scheduled at a subsequent phase: you can operate the business without it, but it's not ideal).
After some time, and with the key users' feedback, the need for some developments will usually change as the client learns how they will use the system and find that it works just fine as is (typically we notice that 50% of developments previously requested are no longer necessary and new developments are requested).

Progress Report

Before we rolled out the progress report in our methodology, most customers implemented the initial scope and did not see further beyond that. We missed the opportunity to have a bigger impact on the customer in other areas: becoming paperless, improving HR processes, automating bills, improving knowledge sharing, etc. Essentially digitizing their business.

The **Progress report is used to schedule a meeting with the top management team** to talk about the future of your collaboration, and enlighten them on what's possible.

Having project leaders think in terms of ROI and digital opportunities helps to leverage your business advising skills. They are driven by one simple question:

How can I help my customer's employees do more, in less time?

The Digital Opportunities Matrix

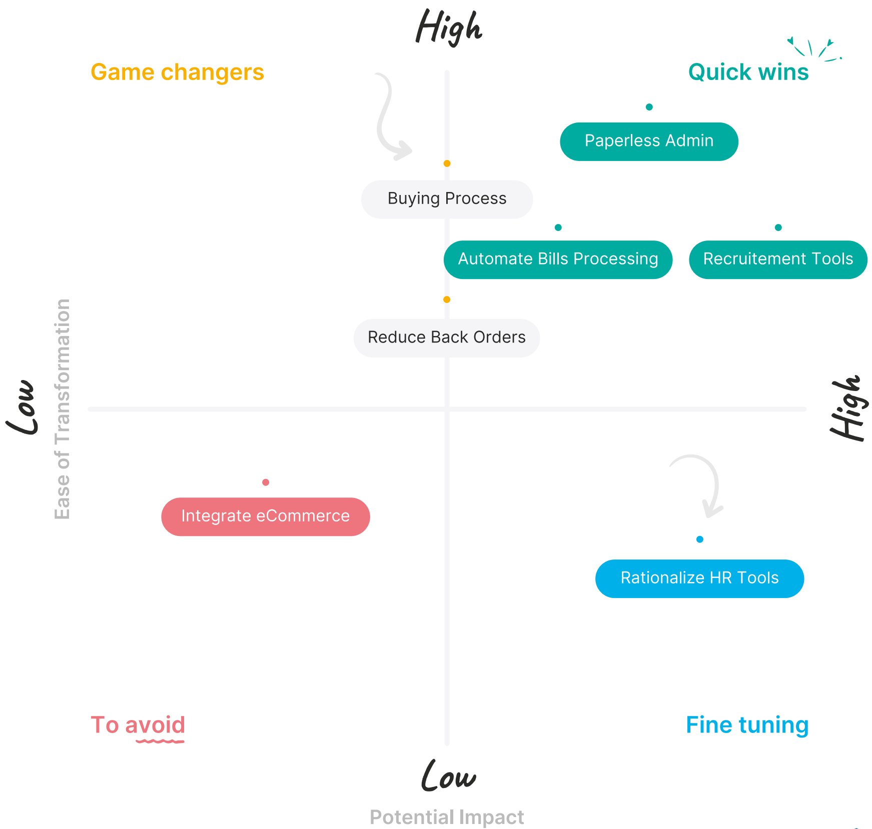
Using the Digital Opportunities matrix, you will identify the top digital opportunities to suggest to your customer.

Assessing the different opportunities through their potential impact and their ease of transformation, you will classify them into 4 main categories and use them as a basis for your decisions:

- **To avoid -** These items have a low impact potential and are too complex to implement: there is no real added value here.

- **Fine tuning -** These items have a low impact potential impact but are easy to implement: these initiatives are not a priority but can be considered during later phases.
- **Game changers -** These are items that have a high impact potential but are too complex to implement: these initiatives have the power to transform the company for the better.
- **Quick wins:** These are your top priority items since you can expect to implement them quickly and they provide a high added value.

You usually start by implementing quick wins and then moving on to the other quadrants when ready. Then, depending on your strategy and priorities, you move onto the next quadrant. Some companies prefer to fine tune what is already working (low risks, lower impact) while others will prefer to focus on the game changers (high impact, but higher risk).



Example of Digital Opportunities matrix

Progress Report Tips

- Just like with the ROI analysis, your goal is to find ways to **make employees save time** on their day-to-day activities.
- You usually work with project managers while implementing the solution. The progress report is intended to be shown to the **top management**, so be sure to schedule a meeting with them.
- **Keep it clean and simple:** Focus on the top 3 most impactful items over 10 that are just ok.
- **It starts on Day 1:** Keep your eyes open throughout the implementation and record your observations about potential opportunities within the organization.
- **Be active:** Do not hesitate to organize meetings to get more information and confirm your assumptions.

Toolbox Ready-to-use template

→ **The Progress Report:** https://www.odoo.com/r/pu9

This subcontractor does machine work on windmill parts.
The production floor uses Odoo to manage their machining operations.

05

Implementation Challenges

ABNASIA.ORG

How to deal with resistant people

A common mistake is to put aside those who are not convinced (afterall, we all prefer working with people who agree with what we are saying). If someone is not convinced, do the opposite: listen to them, invest time in explaining to them the “why” and the ”how”, and “sell” them the solution with training.

Change is always perceived as a cost and a risk for the impacted users. Performing a cost & risk analysis is always worth taking the time to do if the benefit is much higher. While trying to convince people, do not say it is not risky, or not a big deal. **Change is a big deal.**

Instead, you have to **“sell” the benefits** of using the new solution. Organize demonstrations of the product, check how we can solve their pain points, and explain to them why we work that way. If they can see the benefit of the solution, they will accept the risk.

> *During an implementation, the accountant was the most resistant person in the company. The production team was happy about moving away from the previous system and were extremely optimistic about the project. Months later, the accountant kept challenging me in every training and discussion - we went over each workflow to exhaustion (bank reconciliation was probably the worst one). On the other hand, the production team liked every training, and they never really had many questions.*
>
> *Finally, when we went live, everything changed. The accountant accepted the change - and since she put a lot of thought into Odoo and its features, she was ready for it. She knew where to go, what to do, and all her corner cases and possible entries were covered.*
>
> *On the other hand, the production team had a much harder time. They kept forgetting the training, and they presented me with a lot of corner cases in production that*

were never addressed before. They worked overnight to get caught up in production and were frustrated.

I talked to the accountant last week, and she mentioned how much better the bank reconciliation in Odoo is, and that she is happy to be moving forward. When a customer is inquisitive and willing to test and discuss the process (essentially involved in the project), the project is much more likely to be a success.

- Mateus, Project Leader - Odoo SF

How to keep things simple

Customers have a tendency to make things more complex than they are.

- **Avoid giving several options to the customer** and letting them choose what they prefer. Instead, propose the best solution and do not show them the other option unless the customer is not satisfied with your initial proposition.
- **Avoid delaying decisions**, force people to decide, even if they are unsure. Prevent them from saying: "We will ask our key users what they think" and "I have to ask a manager about their opinion".

Even if you think you simplified everything, we can always do better:

- **Involve an app expert during critical phases** (e.g. ROI Analysis, in between phases, etc...) for a peer-review. As they are not involved in the project, they can easily make tough decisions and provide you with another point of view.

How to manage customer expectations

> *"A few years ago, the CEO of a prospect asked me to meet before signing the contract. She told me "this project is life or death for my company, please tell me everything will go smoothly". I replied back with something like this: "No. Such a project is really difficult. We'll have a lot of issues. But in the end, your company will be better. And I need you, as a CEO, to support the project when your teams complain, to get over these difficulties."*
>
> *I didn't hear back from this customer until two years later when the CEO phoned me. The project was seriously delayed and the key users lost trust in the product. One of the first things the CEO told me was: "This project is a nightmare, we are 12 months late, and I don't see the end. But I did what you asked of me: I always supported the project, I never criticised your product in front of the team, and always motivated key users who wanted to drop the project. But, now, we are reaching the limit, I need you to do something for me..."*
>
> *So, these two minutes with the CEO before signing the contract have actually saved the project. If the CEO would have taken the key users side, the project would have been aborted months ago. Because she took her role to support the project seriously, the project has been saved, and deployed in production two months after.*
>
> **- Fabien - Odoo's founder, about the first customer who purchased the Point of Sale app.**

This story perfectly illustrates the **power of managing customer expectations**. If Fabien would have said "don't worry, the project is easy", the CEO would have lost trust in the project and probably followed the key-users advice a long time ago when the tension escalated seriously.

How to write a good specification

A good specification is short, visual and structured as follows:

- **The Business need:** Explain, in a few short sentences, the why behind the need for the development. What makes development necessary?
- **The Functional analysis:** A mockup, or an annotated screenshot.
- **Technical hints:** Things the developer will have to take care of.

Toolbox

→ Example of a good specification:
https://link.excalidraw.com/l/65VNwvy7c4X/11FJkoHvkDu

Avoid importing data history

In addition to master data, customers often ask to import the full data history, like quotations and sales going back 7 years. This takes a lot of time and it will eat up a large part of the budget because it adds risks to the project's success. It must only be done when it is truly justified and preferably after going live.

Ask the following questions to check if it is really necessary:
- Is it possible to keep that information in the old software, or an export file?
- How often will your customer consult that information? For which purpose?
- What strategic impact might it have in 2, 3 or 4 years?

Just like any other request, as long as the customer cannot convince you of the need, the import request needs to be refused, or delayed until after the Go-Live.

A few months ago, I implemented Odoo Accounting for Ibbeo Cosmetiques, a pharmaceutical group of three companies in France. During the Kick-Off, my SPoC told me that taking over all historic data from Sage was a must. She needed it all in Odoo to check it when necessary. I explained to her that importing historical data put the project's schedule at risk, and that it would take days of consultancy for very little added value.

I made her a deal: we start the accounting for all three companies in only three weeks, with very little effort from her side. If we do it my way, we will have several hours left on the service pack to use in the future. And if, later on, she decides it was still necessary to import the historical data into Odoo, we could do it in a second phase. She agreed.

One week later we had our first call and I imported opening balances and master data. Finally, after the training, the project went live for all three companies after just 2,5 weeks, with 9 hours left on the service pack.

A month ago, she sent me an email in order to thank me for the quick startup and that Odoo was so much more user friendly than the previous ERP she was working with. She also told me that in the last 3 months she did not need to check a previous accounting entry once and that she was in contact with her sales advisor to add more modules and take over all her activities in Odoo.

As we get more accounting firms joining Odoo, I often have requests to import accounting entries from the past 5 years. Everytime I use this project as an example and let them decide. Either to deploy the project in only 2 weeks with little effort and few hours of consultancy or to deploy in 2 months and pay 4 times more for something they will use once a year.

- Wynand, Project Leader, Odoo BE

Avoid writing documentation for your customer

When implementing Odoo, you might be driven to create specific documentation to ease the end users' onboarding. Even if it seems to be a good idea, you will realize that the value you can bring is not worth the time invested. As a Project Leader, you need to focus on tasks that only you can deliver.

In other words, Project Leaders must not waste time on repeating explanations already given throughout the project. The customer needs to be responsible for building their own documentation based on their own business cases and terminology.

Additionally, the SPoC is the person who has the widest business knowledge among all the Odoo implementation stakeholders on the clients side.
Moreover, letting the client write their own documentation guarantees that the configured Odoo workflows are properly understood and handled by the SPoC. This eases the change management process as the end-users have direct access to a reliable source of knowledge in their own company. Some clients go as far as having their own team of Odoo experts who handle all things Odoo for their company.

Of course, most standard flows are already covered by existing documentation, Odoo shares all knowledge online. Small projects usually do not require specific documentation.

How to deal with customers' specific demands

When dealing with customers, remember that there is a difference between the stakeholders' objectives, and the key-user's needs. Most decision makers' priorities are time and budget, while key-users will mostly ask for specific features. As these objectives contradict each other, you will have to decide: who do you want to please?

You need to always do what you think is best for the project; this means challenging what key users request, to the point of refusing to do it if you think it is not worthwhile for the project. Use the following tactics to deal with custom development requests:

1. Is it really necessary?
2. Is it worth supporting the cost (of developing and maintaining it)?
3. Is the gain significant enough?
4. Can we serve the same objective with a different approach?

If you come to the conclusion that developing a specific feature is not worthwhile, you need to try harder to convince the customer of your perspective. There are different tactics you can employ for this: explain the “Why”, plan it for a phase after the "Go-Live" date, or escalate the topic to a manager (while not ideal, it is sometimes necessary).

Tactic 1: Is it really necessary?

Let us say that you have a request for the following custom development:

> *The customer has a website developed with Magento eCommerce and does not want to change their website since they already invested a lot of money into it. But they would like Odoo to be completely integrated with their Magento website (including products, coupons, follow-ups on abandoned carts, etc...).*

The best way to assess if it is necessary is to check if **the customer already has this feature in their old software**, or not. If the customer records all orders manually in their old software, they can do it the same way with Odoo. We would then recommend first going into production without developing an integration with Magento, use Odoo for a few months, and then decide if it is worth it. Remember, customer’s priorities change when they go into production.

In terms of change management, it is easier to roll out business process changes progressively, rather than everything all at once. With the modularity of Odoo, it makes sense to deploy it in several phases: first with what the customer absolutely needs to operate the business or has the greatest impact to their success, and only after that do you move onto the second phase, where you focus on other features to improve efficiencies.

> *A key-user asked me to reproduce a complex report that they built every week in Excel. According to the user, this report was very important for the CEO. However, I challenged the user with the aim to know which KPI was relevant for the CEO.*
>
> *It appeared that the CEO only checked a few amounts, which were the balance of some analytic accounts. Instead of going forward with development, I showed the CEO how to check these balances directly in Odoo, and they were happy about it.*
>
> *Challenging the customer not only reduces custom development and risks of delay, it also brings a lot of business value.*
>
> **- Cédric, Project Leader, Odoo BE**

Tactic 2: Is it worth supporting the cost?

You need to evaluate the benefit: how many man-days per month will the customer save because of this feature? Often, the customer only accounts for how much time they spend on this kind of task currently, and how much they think they will save in the future. In reality, they will still have to record all data necessary for the computation, deal with exceptions manually, etc. Example: Even if the customer develops a Magento connector, they will still have to solve all conflicts, record price discounts in both software solutions, deal with inventory conflicts as the synchronization is not real-time, etc.

Then, you need to evaluate the ongoing costs. Often, the customer only sees the "one-shot development cost". In reality, you can multiply this cost by 2 or 3 for the future maintenance and upgrades over the next 5 years.

Note that using a community module allows you to save time in the initial development, but you'll still have the time spent with testing, maintenance, project delays and upgrades to account for in the total cost. A community module contributes to technical debt as well.

Tactic 3: Is the gain significant enough?

Let us say you have a request for the following custom development:

> *When we confirm a sale order for a construction project, we want to create a series of tasks based on a set of rules that depend on the products, customers and locations.*

When you have a request for customization, you need to first question the volume: “How many construction projects do you win per month?” Let us say the customer wins 10 of these projects per month. It probably takes 10 minutes to create and update tasks by duplicating and updating project templates.

Is it worth launching a complex development to save under 2 hours of work per month? Surely not, this feature will cost around 10 days of development, plus 25% of this every year.

Tactic 4: Can we serve the same objective, with a different approach?

Let us say you have the following customer request:

> *I want to synchronize our Outlook calendar with Odoo CRM.*

Odoo has a connector with Google Calendar in standard, but not with Outlook. But developing and maintaining a connector might cost a lot of money. However, there are plenty of services that synchronize Google Calendar with Outlook (such as IFTTT). So, a solution would be to subscribe and setup such a service for every employee.

It is not perfect as you will have to modify your setup every time you recruit a new employee, but the solution is ready in 2 hours, and it will only take 10 minutes per new employee. However the cost is still much less than a new development, if the company has less than 100 employees.

A couple of years ago I did an implementation for Bioulvax, a Belgian wine producer. The SPoC for the project was passionate, but he was convinced that his way of working was the most efficient and that everyone in the company should work like him.

We didn't do a good job since we compromised and accepted some of his requests. We had date-fields that were almost never used, selection-fields that filled up screens for no good reason, menu items that were not user friendly, etc. After a couple of months with the system, we noticed that a lot of employees just did not use it, they were reverting back to their old software without telling the management.

When we realized that, we suggest the following: "let's revert back to how the system works in full standard and let's talk to the team to see what they want to get out of the system". In other words, we asked people what they wanted, instead of forcing a specific way of working. We organized demos fully based on the standard with the objectives of the team in mind.

They could not believe how easy it was to use the system and, when going live again, the entire team adopted Odoo and dropped their old habits. I learned to always challenge the SPoC's requirements, and keep focusing on the business objectives. Often, customers know their business, but not how to implement it.

- Cédric, Project Leader, Odoo BE & SF

Why must you minimize custom development?

For customers, a custom development creates additional cost and timeline delays, sometimes to the point of putting the project at risk. In addition, custom development leads to technical debt that the customer will have to pay for within the coming years in the form of maintenance and upgrade costs. Such a technical debt costs around 25% of the development cost EVERY YEAR (~17% in maintenance + ~8% in upgrades).

Each development may seem simple and affordable. But, as already explained, the complexity of a project grows exponentially as the number of customizations increase, not linearly. Customer's probably want to change what they did not like in their previous software, but would it not be better to standardize their business processes and implement the project two times faster and for half the price?

For implementation service companies, custom development usually comes at a high cost, for a low customer value. This is the typical scenario: you estimated 10 days to develop a feature; the customer thinks it is too much for such a "basic" feature so you charge only 8 days for it, but in the end, you spent 12 days on it. We later discover issues and changes that are needed because you had to do it in a hurry and the customer would not pay for the extra time since it is your fault. What would have been a 35% margin service is now a 6% loss on service!

To grow, it is easier to focus on valuable services with better margins, and decrease the risk of non-billable hours. Such services include: project management, business analysis, customizations without development, change management, and training.

Service companies who build a mindset on reducing custom development, sooner or later, will be more competitive than the others. Companies who better manage their customer's expectations will have lower project implementation costs. Of course, custom development is sometimes necessary to run a business. However, from our experience, the majority of customer requests are either not worth the cost and not relevant once they start to use Odoo, or they can get by without it as it is not part of their core usage.

Mecatis is an engineering company specialized in the conception, production and maintenance of manufacturing machines. They started using Odoo community in 2013 and were stuck with a very old version. In 2017, they contacted us to upgrade to Odoo 11. We discovered 4 custom modules and 55 community modules on their database. They spent tens of thousands of EUR in development and maintenance, which is not normal for a company of 10 employees. That was a huge amount of technical debt, and the cost to upgrade these modules would have been astronomical.

Instead of upgrading these modules, we challenged every single one of them: some modules could be replaced by existing features in Odoo 11, other features were not used, and for the rest, the customer did not even know what those modules did. So instead of upgrading their custom modules, we trained them on the standard, and helped them change the way they worked. In only 100 hours of service, we moved them to Odoo Online, without a single development. Their monthly cost was reduced by a factor of 10x.

I am sure that during the implementation, this engineering company, or their partner, thought they needed these community modules. But in the end, it turns out that it was more beneficial for a small company to stick to what was standard in order to avoid being stuck in older versions. After the move to Odoo Online, the customer was so happy that we won a good sponsor; they subscribed as partners to resell Odoo Online to their own customers, delegating the service to our teams.

- Fabien, Odoo's founder

How to deal with internal politics

When something goes wrong, people try to find someone to hold responsible and come up with excuses to defend themselves. This often happens when several service companies are involved in the project. In the case of a failure, they will claim they are not at fault and say it was the other's responsibility.

Internal politics is a game where everyone loses. The best way to deal with internal politics is to avoid playing the game. When a project fails, it is usually everyone's fault. So, when shit happens, do not waste your time arguing about who is responsible or building your defense.

Instead, focus on moving forward and solving the issues (whether they are yours or not; we do not care who is responsible, we care about the project's success).

> *Minerex is a company that buys different building materials from the USA, then imports and distributes them within Mexico with their offices all based in Mexico. Before 2016, they were using SAP to manage their business.*
>
> *The owners of Minirex were living in the US (Jacksonville, FL). They decided to implement Odoo, but they were not involved in the company's operations. They were not aware of the different processes or business documents used by the company, etc. The company was effectively operated by the employees in the Mexico office.*
>
> *And this was a recipe for failure. Why?*
>
> *The decision to implement Odoo was made by the owners, without having the buy-in from anyone from the Mexico office. So, since the Kick-Off call, it was evident that none of the employees in Mexico were looking forward to implementing Odoo. Since no one had asked their opinion about it, they saw Odoo as something that was being*

imposed onto them (i.e. "the owners are just trying to save money, dumping this erp software onto us"). Throughout the implementation, they were very resistant to change: everything was slow moving and the implementation was a low priority for them, etc.

Initially, we were not aware of this situation, but as soon as we figured it out we had a conversation with the owners. Both the owners and the consultant traveled to Mexico in order to gain buy-in from the Mexico office. We showed them what Odoo was capable of and how it would be able to handle their processes more efficiently than their previous SAP system. It was not until that moment that the implementation started really moving forward.

In conclusion, make sure that the key users are on board before jumping into an implementation. In the end it will be these key users that will use Odoo, and collaborate with you during the implementation process.

- Miquel, Director, Odoo Mexico

How to deal with different people's dynamics

Managing many projects at once is not easy and having to adapt your speech to every single person working with you makes it impossible. However, it sometimes helps to detect different personality profiles:

“Do it now” gets right to the point.
Your SPoC will generally not invest enough time in their learning process and might go too fast for the end users to be correctly onboarded onto Odoo. Your actions are to:

- Make sure that the SPoC knows Odoo properly (triple check).
- Make sure that the SPoC communicates enough internally about the project (check that they take the time to prepare the speech they are going to give to the end-users).
- Make sure the resistant people get involved in the project (greater involvement in the key-users selection).
- Get involved in the final-users training (train in tandem).

"Do it right" respects the rules down to the smallest detail.
Your SPoC might be resistant to any change "because we've always worked like that" and question your legitimacy in suggesting a new approach. Your actions are to:

- Skillfully challenge your customer's requirements (focus more on the added value than on the fact that it is standard).
- Involve App Experts faster to strengthen the legitimacy of your suggestions.

"Do it harmoniously" has a good overview of their business and expects the same in their project. Your SPoC might want to have full control over all situations (from the smallest details to the big picture). Your actions:

- Make sure key-users attend courses on https://odoo.com/learn.
- Make sure that they become knowledgeable in Odoo (extra training if required).

"Do it together" is highly flexible, solution oriented. Your SPoC will have 1.000 ideas per minute and change their mind often. Your action is to:

- Make the rules crystal clear: The SPoC expresses the business needs (the what & why) and you make decisions on how they need to use Odoo (the how).

Why must young Project Leaders feel confident?

We have seen too many young Project Leaders thinking they are not "good enough" in front of experienced people and thus they do not stand up for what they think.

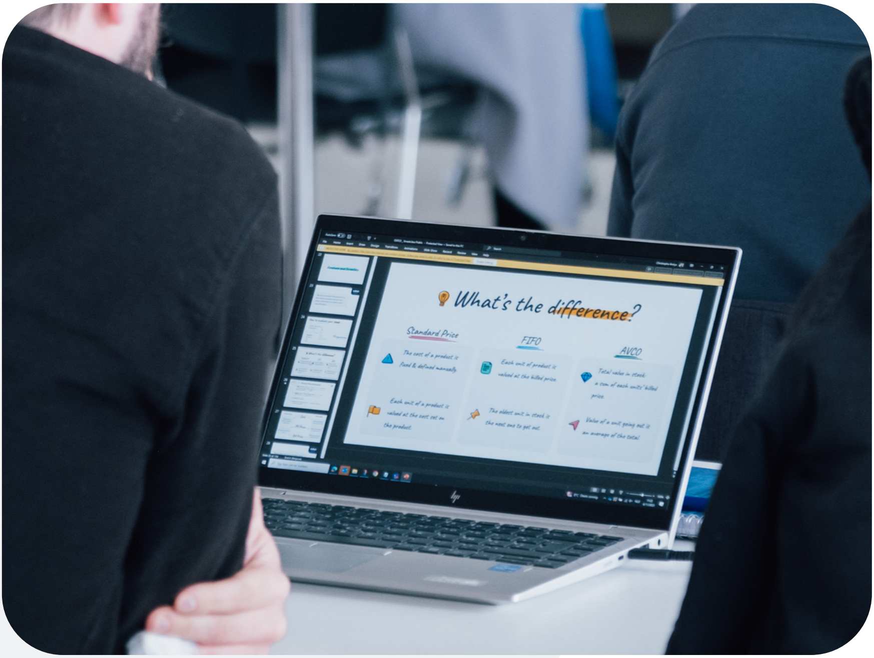
Experience is overrated. Business decisions must always be supported by common sense, not (only) by past experiences. You do not need to be experienced to be rational. Sometimes experience is a liability more than a proof

of knowledge: people do things “by experience” (habits), and not because it is the most rational approach according to the context.
For that reason, young Project Leaders must not be afraid to defend their point of view, and challenge experienced people. This will force experienced people to explain why they think a certain way. If they are rational, their experience will convince you. If not, feel free to defend your point of view.

> I have hired more than 60 Project Leaders over the last few years and most of them were fresh graduates. These juniors were open minded, motivated, full of energy and wanted to prove themselves.
>
> Our project implementation methodology combined with the constant evolution of the product make our “newbies” learning curve almost vertical in their first few months as Project Leaders. Rather than experience, good onboarding gives them the right tools when convincing customers.
>
> The crucial message I pass on to my newbies is always the same: no matter the knowledge and experience, the most important skill to succeed as a Project Leader is having a strong mindset.
>
> **-Catherine, Head of Project Leaders, Odoo Belgium**

06

Quiz



Are you ready?

Use Case 1

During the implementation of a 9-month project, a key user requests a change that will save them 4 hours of work every week. The user tells you that it is the main reason why they want to change their software. Unfortunately, the feature is not standard, and it is estimated to take 2 weeks of extra development. What will you do?

- ☐ **A.** If the customer is ready to pay; it is ok to develop what will satisfy their need.
- ☐ **B.** Try to convince the customer to avoid the development, but ultimately accept if they really want it.
- ☐ **C.** Add this feature to the backlog of development to do after the Go-Live.

Use Case 2

The Project Manager of a company with 20 employees wants to add an additional validation step on employees' expenses: any expenses higher than 500€ needs to have a second approval by the CFO. You estimate 2 days of extra development. What will you do?

- ☐ **A.** Add the new validation steps in order to fit with the company's constraints.
- ☐ **B.** Define an internal policy (ask your manager and CFO for >500€ expenses) and ask employees to send an email to both of them.
- ☐ **C.** Refuse to consider it as an acceptable need.

Use Case 3

During a remote weekly delivery validation session, you are demoing your work (configuration and minimal customizations) on the customer's billing cycle. All of a sudden, the CFO reveals himself in the audience by strongly indicating that a mass invoicing validation feature is missing and that (overall) your demo is a fiasco. The key-user for this area turns silent and refuses to react to your inquiries, in spite of the fact that the latter actively participated in all previous sessions. How do you get disentangled?

- ☐ **A.** You apologize, shut down your computer & go home... Tomorrow is a new day.
- ☐ **B.** You continue repeating that everything has been done according to the key-user.
- ☐ **C.** You apologize, agree with the CFO and promise to get it fixed.
- ☐ **D.** You remind them of the basics by referring to the ROI analysis.

Use Case 4

For a project status meeting, the customer invited stakeholders of each of the 7 departments. They have 10 representatives in the meeting. How many project leaders of Odoo need to attend this meeting?

- ☐ **A.** 1 or 2, more would be a waste of time.
- ☐ **B.** 4, to feel 'serious' compared to the 10 brought forth by the customer.
- ☐ **C.** 7, one for each department to integrate.
- ☐ **D.** 0, as much as the customer.

Use Case 5

Imagine the following situation:
"*Before the Go-Live, you have a meeting with the CEO. You have had a lot of issues during the project, they are not confident about your solution anymore, and they are scared about the Go-Live. The CEO is thinking about pushing back the Go-Live another 6 months. They meet with you and say “My company cannot afford more issues. To accept the Go-Live, I need you to tell me everything will be smooth.”*
What will you answer?

- [ ] **A.** Pushing back the deadline is actually a good idea to reduce risks.
- [ ] **B.** Don’t worry, everything is under-control; we tested everything.
- [ ] **C.** A go-live is always difficult, but we will fix issues quickly.

Answers

Use Case 1

Answer: C. Since the user is not using such a feature in their current software, they can live without it for a few extra months.

Avoid an extra delay to the project: an extra 2 weeks doesn't seem a lot, but you never know how many decisions like this one you will have to face during the course of the project.

Use Case 2

Answer B: Small companies often change the way they operate. Thus, it is usually better to define a policy, rather than developing a custom feature.

All you have to do is to send the procedure by email to employees: ask your manager and your CFO by sending an email. As opposed to a rigid development, policies can be adjusted easily and still allow common sense to prevail (e.g. if your manager is on holiday, you can only ask the CFO to validate).

Use Case 3

Answer B: Recall the ROI analysis by sharing it on your screen. You pinpoint that project success is defined by the responsible ownership of the key-user for that area as explicitly agreed with all stakeholders at project start. You are willing to address the CFO together with the key-user to circumscribe his worries in a separate session, noting that (if assessed appropriately) the need will be put in the project parking lot for everyone's post Go-Live requests. Escalation might be appropriate since an alternative could be dropping existing backlog content to be replaced by their needs.

Use Case 4

Answer A: We have to be the most efficient possible. If you have experienced project managers, one person is enough. However, it is good to invite new business analysts to the meeting for them to learn. Or, if the project manager is not comfortable on a topic, he can ask the help of an expert.

Use Case 5

Answer C: A go live is always difficult: shit will happen, even if we push the deadline by 6 months. That's normal. And I need you to support the project when the team complains. On our side, we will fix issues quickly as they rise. Pushing back the deadline by 6 months will increase the cost of the project, and put the project's success at risk (so many things can change in 6 months). It is ok to be honest and upfront about the challenge ahead. If the CEO sees that you know what you are doing, and are transparent in your approach, they will trust you.

07

Measure your progress

ABNASIA.ORG

Here are milestones that most of Odoo's Project Leaders reach as they move forward in their career.

Novices

1 point ☐ **Have a project on time & on budget**
Deploy a customer in production within the initial timing and budget.

1 point ☐ **Receive a gift from a satisfied customer**
Have a customer so satisfied that they offer you a gift.

1 point ☐ **Deploy min 4 apps, in 2 weeks per app**
Example: Sales, Purchase, Inventory, CRM, Invoicing in less than 10 weeks.

1 point ☐ **Deliver a project at 80% of initial budget**
Deploy a customer in production in 80% less hours/days than the initial quote.

1 point ☐ **Deploy a company of 25 users, alone**
Put in production with no help from another expert.

Experienced

2 points ☐ **Pass Odoo's certification with 70%+**

2 points ☐ **Go-Live within 70% of the initial budget**
Deploy in production in less than 70% of the initial time estimated.

2 points ☐ **Success in 3 different industries**
Have implemented a project successfully in 3 different industries.

2 points ☐ **Migration from a traditional ERP in 2 months**
Move from Netsuite, Dynamics, SAP to Odoo is less than 2 months before the Go-Live.

2 points ☐ **Have 3 projects in a row on budget**
Deploy 3 projects in production, without an extra success pack.

Experts

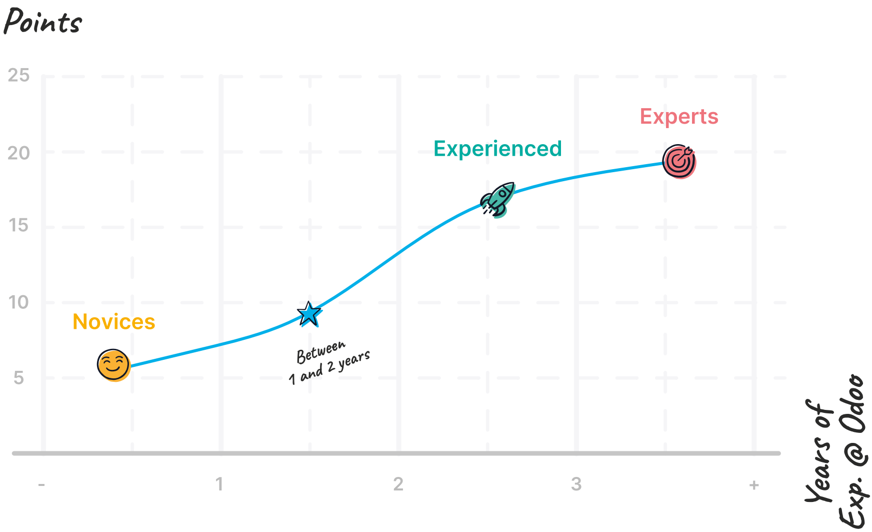
3 points ☐ **Implement 500 users in production**

3 points ☐ **Save a customer from bankruptcy**
Have a customer who tells you that you saved their company from bankruptcy.

3 points ☐ **Have 10 projects on budget**

3 points ☐ **Did a migration of a traditional ERP in 4 weeks.**
Migrate a traditional ERP (Netsuite, MS. Dynamics) to Odoo in less than 4 weeks.

Your Result



Points / Years of Experience @Odoo

08 Extra References

Extra Reference

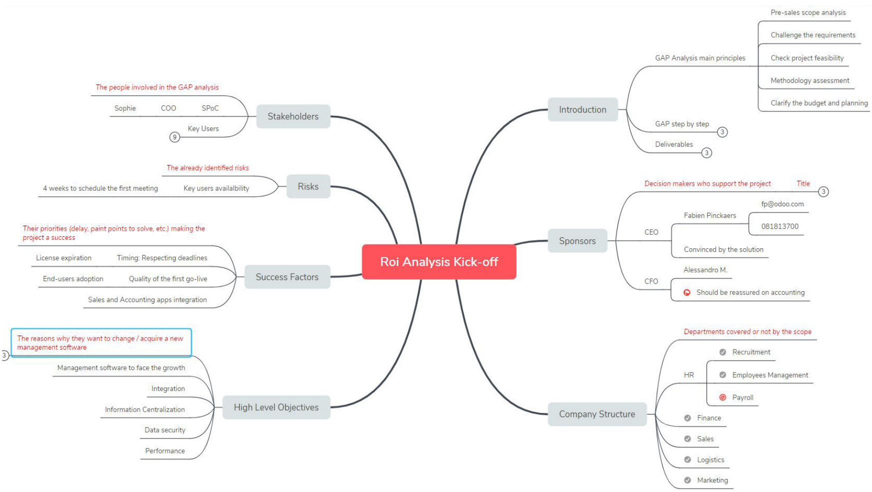
- Odoo Blog Article "*Stick to standard*": https://www.odoo.com/r/blog_implementation
- Odoo Blog Article: "*The key to Implementation Projects: Manage Customers Expectations.*" https://www.odoo.com/r/blog_implementation

Appendices

Appendix A: ROI - Kick-Off

Use **XMind**[1] to take notes during the ROI Kick-off meeting with the SPoC and the decision makers. With this template, start from the top right element “Introduction” and move clockwise during the interview (the left nodes are for notes taken during discussions).

Download the template: ROI Kick-off: https://www.odoo.com/r/roi_kickoff



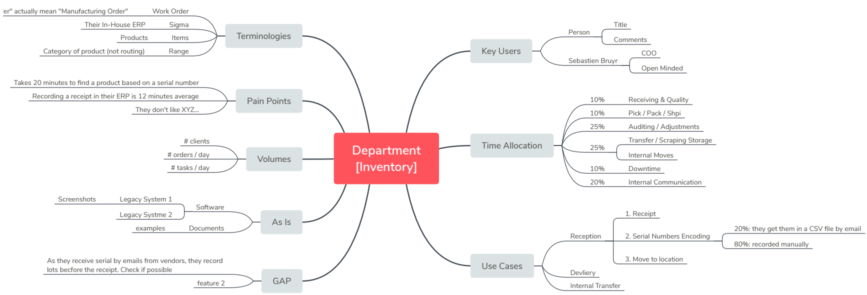
ROI Kick-off Template

[1] https://www.xmind.net/

Appendix B: ROI - Key-users Interview

Use **XMind**[2] to take notes during meetings with the key-users. With this template, start from the top right element “People” and move clockwise during the interview (the left nodes are for notes taken during discussions).

Download the template: ROI Key-user Interview:
https://www.odoo.com/r/roi_key_user_intw



ROI Key-user Interview Template

Appendix C: ROI - Analysis Tool

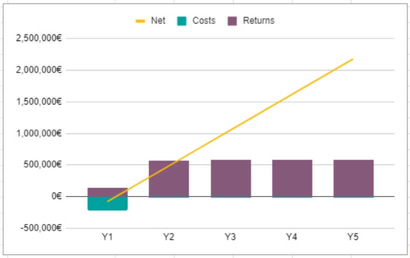
Use a Google Spreadsheet to document your ROI Analysis.

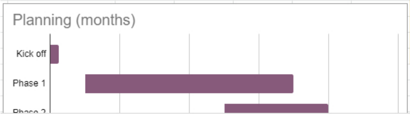
Download the template: ROI Analysis Tool:
https://www.odoo.com/r/roi_analysis

[2] https://www.xmind.net/

Returns			
Cost Savings	Costs	Effiency Gained	Perf Savings k€
Legacy Software Licences	100,000€	0%	10,000€
Sales	275,000€	21%	75,000€
Procurements	296,875€	18%	65,625€
Inventory	340,000€	24%	110,000€
Finance	510,000€	32%	240,000€
MRP	275,000€	21%	75,000€
Services	1,006,579€	6%	€67,105
Marketing	346,750€	22%	98,250€
Human Resources	271,875€	25%	90,625€
Totals	**€3,422,079**	**19%**	**575,625€**
Total FTE's	**70.25**		
Operating Leverage	Current Cost	Effiency gained	Improvements
Better product configurator		1%	1000
Reduced inventory		2%	
Sales Productivity		3%	
Yearly Extra Revenues			**1000**
Investments			
Implementation Costs			Subtotal
Data Import		9%	20,700€
Developpement		10%	21,600€
Integration		7%	16,200€
Standard		44%	96,300€
Training		8%	18,000€
Project Management		22%	47,500€
Total Implementation			**220,300€**

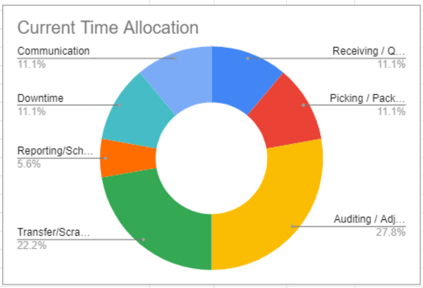
Project Duration	9	months			
Return on Investment					
	Y1	**Y2**	**Y3**	**Y4**	**Y5**
Returns	143,906€	575,625€	576,625€	576,625€	576,625€
Costs	-220,300€	-13,272€	-13,272€	-13,272€	-13,272€
Net	-76,394€	485,959€	1,049,312€	1,612,665€	2,176,018€

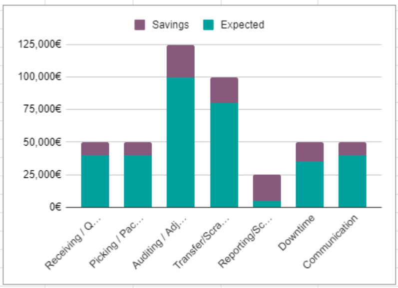




ROI Analysis - Overview

Inventory								
FTE	8							
FTE Cost	50,000€							
						Usual Savings		
	FTE	**Time**	**Efficiency**	**Expected**	**Savings**	Paper/Excel	ERP w/o Scanner	ERP w/ scanner
Receiving / Quality / Labelling	1.00	11%	20%	40,000€	10,000€	20%	60%	0%
Picking / Pack / Delivery	1.00	11%	20%	40,000€	10,000€	20%	60%	0%
Auditing / Adjustments	2.50	28%	20%	100,000€	25,000€	20%	60%	
Transfer/Scraping/Storage	2.00	22%	20%	80,000€	20,000€	20%	60%	0%
Reporting/Scheduling	0.50	6%	80%	5,000€	20,000€	80%	40%	20%
Downtime	1.00	11%	30%	35,000€	15,000€	80%	40%	20%
Communication	1.00	11%	20%	40,000€	10,000€	80%	40%	20%
Total	**9.00**	100%	24%	340,000€	110,000€			





ROI Analysis - Department Returns

To modify Accordingly to the project				
Apps / Departments	Phase	Ressources	# Resources	Kick-off #weeks
Sales	Phase - 1	Project Management	1	2
Human Resources	Phase - 2	Business Analysis	3	
Department 3	Phase - 3	Development	4	
Department 4				
Department 5				

ROI Analysis Template - Tab Investments

Appendix D: ROI - Closing Presentation

Use Google Presentation to document your ROI Analysis. Link all your graphs and tables with the GAP Analysis Tool for an automated update of the information.

When it comes to submitting the results of your analysis to your customer, it's important to give a clear and clean overview of the coming project to the decision makers.

Download the template: GAP Closing Presentation:
https://www.odoo.com/r/gap_closing

Appendix E: Progress Report Example

A good example of Progress report:
https://www.odoo.com/r/pu9

Appendix F: The Odoo Change Management

Get more details about our approach:
https://www.odoo.com/r/change_management

Appendix G: Specification Example

How to write a good specification:

https://link.excalidraw.com/l/65VNwvy7c4X/11FJkoHvkDu

JULY 2024

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