



Business Process
& Technology
Optimization



BUILDING AN ERP FOUNDATION AND BUSINESS TRANSFORMATION

In many growing companies, systems and processes don't keep up with increasing complexity. Practical workarounds such as new spreadsheets, manual processes, and disconnected tools can gradually become embedded in day-to-day operations. Over time, those workarounds limit visibility, slow decision-making, and make it harder to scale consistently across sites.

A multisite food and beverage manufacturer found itself at that point. Demand was strong, and the business had expanded, but leadership was increasingly relying on information that required interpretation and reconciliation before they could trust it. Much of the data was still on paper. Reporting cycles were longer than they should have been, and inventory was not always clear. Coordination across functions was becoming more difficult as the organization grew.

What had once been manageable inefficiencies had become a broader constraint. The company lacked a consistent, integrated way of operating that could support its next phase of growth.

WHEN THE SYSTEM SHAPES THE BUSINESS



At the center of the challenge was a legacy enterprise resource planning (ERP) platform, which the company implemented decades earlier. As processes evolved, they adapted to the system's limitations using separate spreadsheets and standalone systems.

Teams frequently re-entered data across systems, increasing the risk of errors and adding unnecessary effort. Inventory visibility was limited and often delayed, making it difficult to align production, fulfillment, and purchasing decisions. Reporting required manual consolidation, reducing confidence in the numbers and slowing response times.

These issues affected many areas of the organization. Operational inefficiencies affected cost and throughput. Inventory uncertainty


complicated working capital management. And as the company expanded across sites, inconsistent processes made coordination more difficult and outcomes less predictable.

Company leaders responsible for financial performance, operational efficiency, and technology enablement recognized that replacing the ERP system alone would not be enough. The business needed a more fundamental shift in how it operated.

Because the organization had limited experience with business transformation or even large-scale system implementations, it partnered with Integrated Project Management Company (IPM) to lead the effort.



DEFINING HOW THE BUSINESS NEEDED TO WORK


 Rather than moving directly into system selection, IPM led a structured assessment to document how the business operated across functions, sites, and key workflows. This revealed inefficiencies and dependencies between teams that created delays or rework.

From that foundation, the team defined what needed to change. They targeted more consistent processes, better data integrity,

and the ability to access timely, reliable information for decision-making. These needs informed a comprehensive set of system requirements—more than 600 in total—which provided a basis for evaluating potential solutions.

This early alignment proved critical. It ensured the business anchored subsequent decisions in how it wanted to operate going forward, not in replicating the constraints of the current state.

MAKING DECISIONS UNDER REAL-WORLD CONSTRAINTS


 With requirements established, the organization moved into vendor selection and implementation planning. This phase required bringing together stakeholders from across functions, many of whom had limited experience evaluating enterprise systems, to make decisions that would shape how the business would operate for years to come.

IPM worked with the team to create structured, side-by-side comparisons of potential platforms and facilitated evaluations using realistic scenarios tied to day-to-day operations. This allowed

stakeholders to move beyond abstract features and assess how each option would function in practice.

At the same time, execution required flexibility through global supply chain and economic uncertainties. Team availability and participation changed, and executives had to revisit decisions as conditions evolved. In response, the program balanced forward progress with reinforcement to ensure stakeholders across the organization understood, aligned to, and executed those decisions.

IMPLEMENTING FOR HOW THE BUSINESS ACTUALLY OPERATES

 After the organization selected the system, IPM continued to focus on how work would be performed in the future, integrating the people, processes, and technology.

The team redesigned cross-functional workflows to reduce duplication and improve coordination. Data-quality issues—common in long-standing legacy environments—required additional effort, including rework and validation, to ensure information would be reliable in the new system.

Operational constraints also shaped the rollout. Staffing limitations and day-to-day demands made a single, comprehensive launch impractical. Rather than delay, the team used a phased approach,

allowing core functionality to go live while continuing to stabilize operations and complete remaining elements.

Because many team members had not previously worked with an ERP system, training was designed to be practical and role specific. The implementation team worked with functional leads to support adoption within their teams. And they provided additional training where needed to reinforce new processes.

Throughout, the emphasis remained on building something the organization could realistically sustain. So they ensured processes were clear, systems reflected how the business needed to function, and governance could support ongoing improvement.



A MORE VISIBLE, COORDINATED WAY OF OPERATING



The company implemented a cloud-based ERP system across its sites, establishing a more integrated operating environment. With improved data visibility, leaders gained a clearer understanding of inventory, production, and performance, enabling more timely, confident decision-making.

Standardized processes reduced duplication and manual effort, contributing to measurable cost savings. They saved about \$480,000 in the first year through reductions in redundant data entry and improvements in inventory management.

Importantly, the nature of the work itself has changed. Activities that were previously reactive—reconciled after the fact, managed through workarounds—are now more coordinated and visible in real time. Teams across functions and sites are better aligned, and information flows more consistently through the organization.

The company has also established a foundation for continued progress. With governance structures in place and a clear path for expanding functionality, the organization can build on this transformation in a controlled, deliberate way.

BUSINESS TRANSFORMATION FROM CONSTRAINT TO CAPABILITY



The effort to replace an aging system ultimately addressed a broader challenge: how to operate effectively as the business grows.

By aligning technology with processes, and processes with how the business needs to perform, the organization moved from a fragmented, reactive model to one that is more coordinated, visible, and scalable.

