Don't Let Data Migration Become Your ERP Roadblock

Data Migration can terrify even the most seasoned implementation consultants. Examining some of most notorious ERP failures of the last decade reveals data migration as a common culprit — Vodafone, PG&E, and Target's expansion into Canada are notable examples.

If some of the biggest companies in the world can fall victim to data migration disasters, it is important to identify the pitfalls and potholes that lie in the road to a successful ERP implementation.

ROAD CLOSED TO DATA MIGRATION

DETOUR

You Have to Have a Plan

Once you have made your ERP selection, you should already be planning the actions involved in migrating your data to your new ERP system. When data migration is properly confronted, planned for, and executed, it spells the difference between a successful and a failed ERP implementation.

The two most important questions to answer are:

1. Where is the data?
2. How do you get it to the new system?

These questions often go unanswered and overlooked simply because they are so simple. But without a plan that answers them in very specific detail, you're better off going off-roading without maps or GPS.

Look at all of the data that needs to be migrated and determine the following:

- Locate all of the data sources
- Who is responsible for the migration?
- When should the migration occur?
- Identify what is moving where
- Decide how to transfer the data
- How will it be formatted?

Keep it high-level at this stage of the planning — while we aren't worried about anything as granular as mapping fields at this point, that will come next.

Look at the Quality of the Data

Data quality is the crux of project success. The old cliché "garbage in equals garbage out" applies here: in moving to a new system, there is no benefit in migrating faulty data.

Make sure to identify:

- Separate overlapping systems with duplicate or conflicting data
- Missing data/missing fields
- Confusing naming schema
- Generalized, badly defined values
- Sloppy formatting/invalid syntax that could break the new system
- Inconsistent mapping
- Out of date, invalid, inaccurate data

There are ERP tools for data cleansing that should be considered as part of the overall data migration plan, and it helps to have some familiarity with automated data migration solutions.

Here at ERP Advisors Group, we specialize in providing expert data migration guidance. Often, we find that the configuration of the application has been set, but no one has thought about the actual data and getting it cleaned. We help our clients assess the quality of the data, whether it is good or bad, and how much effort is required to clean it.

Is the Answer to Data Quality to Handle It Manually?

No — don't ever attempt a fully manual transform. There are a lot of good software solutions for data migration, and we can help you find the right ones for your needs.

At the same time, software won't do all the work, so make sure to maintain a balance of automation and human oversight. There is a lot of work that can go into removing duplicates, for example: SQL routines can take care of the vast majority of the work, but it still requires some manual guidance to ensure excellent data quality.

What is the Best Approach to Loading the Data?

We have found that problems arise whenever someone attempts to load the data all at once. We recommend working by stages, such as making sure a first small test load works before attempting a larger load.

It is also best to conduct live tests with real data wherever possible, because this can help reveal the types of problems that should be addressed before the go-live, such as mapping errors or bad syntax. Testing real data provides a range of variables that can be difficult to replicate with "Jane Doe" or "1234 Pleasant Lane."

Allocate Enough Resources

It may come as a surprise to organizations going through a data migration for the first time that the implementation partner is not responsible for cleaning the data. This is important to understand: the client must provide the data in usable form, or they are setting themselves up for yet another ERP failure.

Data migration often requires more work than anyone could imagine, and it's best to err on the side of allocating extra time and personnel for the data migration.

Get somebody who has done some systems implementation to help guide the data migration team, be available for the project, and carve out some time. This could be an hour a day to get the plan together, to help select the ERP tools to use for the data migration, or to make an accurate assessment of what is the quality of the data.

Be willing to adjust resources and personnel on the fly to meet actual needs, because it will cost far less than dealing with the disaster of a failed migration.

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Gartner Group forecasts that there will be approximately $500 billion spent on buying enterprise software in 2020, an increase of over 10% from the previous year. Despite this investment in ERP selection, your software vendors and implementation partners aren't responsible for your data.

At the point where the software vendor or implementation partner says, "Okay, give me your data," be prepared for the following:

- Make sure you have a data migration plan in place that covers all the bases

- Don't start the data migration with bad data

- Find the right ERP tools to help automate the process

- Don't try to do the migration all at once

- Correctly estimate the required resources — it's going to take a dedicated team to get the job done

As a final word for people thinking about embarking on a data migration: confront what you must do about your data immediately after the ERP selection. You may find that you need help — and we can guide you in the right direction. Contact us for a free consultation today.

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