



# The Complete F&B Manufacturers Guide to ERP

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## Introduction

# Who is Decision Resources?

For over 40 years, our team has remained at the forefront of ERP and technology innovation. We are passionate about building and implementing best-in-class industry-specific software solutions for American businesses. We specialize in discrete and process manufacturing and have learned a thing or two about project planning, consulting, data mining, project management, implementation, configuration, development, process mapping, and AI solutions and processes.

Our company mission is to share our learnings and resources with our clients and prospective clients, helping you **make informed business decisions that fuel growth.**





## Introduction

# Technology has evolved, have you?

**Of course you have.**

While you may still own some of these nostalgic relics, you are unlikely using them in your day-to-day life. The answers as to why you don't use them are pretty self explanatory:

- **They are slower**
- **They don't easily connect to other tools or WIFI**
- **They are inefficient**
- **They are missing critical information**
- **It's not easy to collaborate with others**
- **There are better tools available**

Same goes for business management software or Enterprise Resource Planning (ERP) software. What was available 10-20 years ago pales in comparison to what's available now. If you would choose an iPhone over an old cordless phone then why are you choosing outdated technology to run your business? In this guide we will explore the benefits, processes, tips & tricks, for modernizing your business and maximizing your ERP investments.





Going Cloud

# Cloud Manufacturing ERP By The Numbers

**Understanding the current cloud landscape for manufacturers according to industry experts and technology leaders.**

1. Manufacturing is the fastest growing sector for cloud ERP adoption in 2024.
2. **50%** of manufacturing companies are acquiring, upgrading, or planning to update to a cloud-based ERP in the next 18-months.
3. IT leaders in manufacturing are prioritizing cloud technology as part of their digital transformation strategy in 2025.
4. **64%** of manufacturers are prioritizing making a move to hosted, managed services, or SaaS environments while **26%** are considering a hybrid environment.
5. For midsize companies — revenue under \$1 billion — the cost of owning a cloud ERP system is approximately **3% to 5%** of their annual revenue.
6. **31%** of manufacturing businesses stated their primary motivation for investing in a cloud ERP was the need for collaboration across different locations.
7. Some key considerations for moving to cloud-based ERP included; better usability, efficiency, reliability, and security compared to an on-premise ERP.

**\*Sources:** Technology Evaluation Center, Coach Bar, Panorama Consulting, Third Stage Consulting Group, Roima Intelligence, Gartner.

# Key Benefits of a Modern ERP for Manufacturers



**Increased**  
Production and  
Process Efficiency



**Enhanced**  
Recall Compliance  
and Quality Control



**Simplified**  
Recipe and Label  
Management



**Improved**  
Traceability and  
Regulatory Compliance



**Companywide**  
Visibility and Multi-  
location Access



**Boosted**  
Lot and Batch  
Management Efficiency



**Improved**  
Profit Margins and  
Reduced Labor



**Increased**  
Supply Chain Visibility  
and Optimization



**Enhanced**  
Security and Risk  
Management

# Ultimate Manufacturing Requirements Template

We understand that ERP projects whether it's a full ERP replacement of a legacy platform, or an upgrade to a new version, or a cloud migration, its a significant undertaking. To help make your life easier, we have compiled a comprehensive planning template with key product features and considerations for your team. While we strongly encourage engaging an ERP partner to help you navigate a large-scale migration project, this guide is a great place to start to keep your project on-track and ensure you aren't missing any key ERP functionality that could benefit your business.

[Click Here](#) to Access Your Free ERP Planning Template!

**DOWNLOAD**







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the Year**  
Infor Partner Network

*2x Winner*



**Gold Channel  
Partner**  
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Industrial Partner  
in The US



# ERP Implementation Checklist

Proper project planning is half the battle when it comes to a new ERP. Establishing clear objectives, budgeting, compliance requirements, and having the right team are critical to your success. Effective planning requires a deep understanding of your business requirements along with a forward-looking vision focused on future growth and scalability.

**Integrating our ERP checklist during your planning phase offers your business a comprehensive, strategic, and competitive advantage.**

### Planning & Resource Scope

- ☐ Define your ERP implementation goals
- ☐ Set measurable targets (ex: processing times, inventory turns, etc.)
- ☐ Assign roles and responsibilities across your internal teams
- ☐ Ensure proper project management attention and priority
- ☐ Meet key stakeholders on project timing to ensure companywide alignment
- ☐ Address resource constraints and/or conflicting priorities (be realistic)
- ☐ Ensure adequate allocation of human, technical, and financial resources. We recommend adding a 10-15% contingency for ERP projects.



# ERP Implementation Checklist Cont.

## Budget and Risk Assessment

- ☐ Define your ERP project budget (software, hardware, training, consulting)
- ☐ Break down your budget by project phase (include hard & soft costs)
- ☐ Identify and document potential risks for going over budget
- ☐ Plan a timeline of key deliverables by project phase
- ☐ Develop mitigation strategies including backup resources and training plans
- ☐ Identify project risks such as holidays, employee turnover, or user resistance

## Data Conversion and Change Management

- ☐ Plan your data migration strategy including data-scrubbing and validation
- ☐ Establish data testing processes and identify which data will go into the new ERP
- ☐ Develop strategies for managing organizational changes and new hires
- ☐ Communicate the key project stages with your broader team to ensure alignment
- ☐ Put aside time and resources for staff training, communication, and support





# ERP Implementation Checklist Cont.

### Authorization, Approvals, and Requirements

- ☐ Obtain necessary internal and external approvals and buy-in
- ☐ Check for legal compliance and regulatory requirements
- ☐ Identify any specific industry or security requirements
- ☐ Hold department meeting to understand ERP needs and requirements
- ☐ Document and prioritize (high, medium, low) in accordance with company goals

### Process Mapping, Customizations, and Integrations

- ☐ Create detailed workflow diagrams for current ERP and internal processes
- ☐ Document ideal process workflows for the new ERP system
- ☐ Identify and document all 3rd party systems, applications, or tools
- ☐ Document all existing customizations and unique workflows/work-arounds
- ☐ List all data sources, integrations, and connectivity outputs



# ERP Implementation Checklist Cont.

### Data Mapping, Security, and Standard Operating Procedures (SOPs)

- ☐ Organize and clean up your data in preparation for the new ERP
- ☐ Identify opportunities to improve standardization or organization of data
- ☐ Implement strong security measures like encryption and access controls
- ☐ Ensure compliance with security regulations and conduct testing
- ☐ Create SOPs and user guides for ERP tasks and troubleshooting
- ☐ Establish a feedback loop and a process for keeping these documents updated
- ☐ Create SOPs and user guides for ERP tasks and troubleshooting

### System Configuration and Setup

- ☐ Adjust ERP settings to align with your key requirements
- ☐ Check configurations against functional requirements
- ☐ Integrate your ERP with existing systems and tools as planned
- ☐ Conduct thorough testing for data flow and compatibility
- ☐ Migrate your data from your old systems to the new platform in stages
- ☐ Test as you go and verify data integrity post-migration
- ☐ Identify and document any custom ERP requirements or dev opportunities
- ☐ Establish a feedback loop and a process for keeping these documents updated
- ☐ Create SOPs and user guides for ERP tasks and troubleshooting



# ERP Implementation Checklist Cont.

### Final System Review and Approval

- ☐ Conduct a full evaluation of the ERP solution
- ☐ Secure approvals from all key stakeholders
- ☐ Conduct user interviews and perform a task audit to ensure adoption
- ☐ Verify all users have completed required training - provide additional as needed
- ☐ Confirm data integrity and address any discrepancies
- ☐ Develop a detailed go-live procedure and backup recovery procedures
- ☐ Communicate the schedule and role expectations for all involved

### Ongoing Monitoring and IT Maintenance

- ☐ Set a cadence for regularly collecting and analyzing user feedback
- ☐ Schedule and implement any ERP updates to stay current (ongoing)
- ☐ Continuously monitor performance, KPIs, and identify improvement metrics
- ☐ Adjust and optimize your system for efficiency - constantly identify areas of growth
- ☐ Regularly review and adjust for regulatory compliance as needed
- ☐ Set a cadence for ensuring any customizations, integrations, or tools are working
- ☐ Allocate internal resources for any ERP maintenance or updates required
- ☐ Annually review the ERP alignment with business goals
- ☐ Seek opportunities for adding new automations, workflows, tools, and AI to support long-term growth





Digital Transformation

# Your Step-by-step Transformation Guide

Here is our comprehensive guide to planning a successful digital transformation, cloud-migration, or ERP upgrade project.

## 1. Define Clear Objectives & Scope

A successful ERP project begins with well-defined objectives and a clear scope. Before selecting a system or starting implementation, it's crucial to understand exactly what you want to achieve. Identify your business goals, pain points, and the specific processes you want the ERP to improve. Whether it's improving inventory accuracy, reducing lead times, or enhancing financial reporting, clear objectives will guide the project team and prevent scope creep. Equally important is establishing the project scope. Avoid trying to address every possible process or feature in the initial phase. Instead, prioritize the most critical business needs and build a phased implementation plan. This approach reduces complexity and enables quicker returns on investment (ROI).





## **2. Engage Stakeholders Early & Often**

ERP projects impact multiple departments within an organization, from finance and operations to sales and human resources. Engaging all key stakeholders early in the process is essential to ensure that the system meets the needs of the entire organization. Bring department heads and end-users into the conversation to provide insights on their requirements and pain points. Involving stakeholders not only ensures the system is designed to meet business needs but also increases buy-in. When people feel heard and included in decision-making, they are more likely to support the project and adapt to the new system. Communication throughout the project is key to maintaining alignment and managing expectations.

## **3. Choosing the Right ERP Partner**

Selecting the right ERP solution is important, but choosing the right implementation partner can make or break your project. Your ERP vendor or implementation consultant should have deep expertise in your industry and a proven track record of successful ERP projects. They should understand your unique business processes and offer tailored solutions that fit your specific needs. Evaluate potential partners based on their ability to provide support during each phase of the project, from planning and configuration to training and post-launch support. A reliable partner will offer guidance, best practices, and help you navigate potential challenges, ensuring a smoother implementation.



#### **4. Focus on Change Management**

One of the most overlooked aspects of an ERP project is managing the human side of change. New ERP systems often require employees to adjust their daily workflows and adopt new processes. To ensure a successful implementation, a comprehensive change management strategy is essential. Start by creating a communication plan that informs employees about the project, its benefits, and what changes they can expect. Provide ample training and resources to help users feel confident using the new system. It's also important to appoint change champions within different departments who can advocate for the project and assist colleagues during the transition. Proper change management will reduce resistance, increase user adoption, and minimize disruptions to daily operations.

#### **5. Prioritize Data Quality & Migration**

Data is the lifeblood of any ERP system, so ensuring data quality is critical to the success of your project. Before migrating your data to the new system, conduct a thorough audit to identify any inaccuracies, duplications, or outdated records. Clean, standardize, and validate your data to ensure it is accurate and consistent. Data migration is one of the most complex aspects of an ERP project. To avoid issues, it's essential to develop a detailed data migration plan that outlines how data will be transferred from legacy systems into the new ERP. Conduct rigorous testing to ensure data is properly migrated and functional in the new environment before going live.

#### **6. Test Thoroughly & Plan for Post-Go-Live Support**

Extensive testing is crucial to identify potential issues and ensure the system performs as expected. Testing should include various scenarios, such as unit tests, integration tests, and user acceptance testing (UAT). Involve end-users in testing phases to ensure the system works correctly for real-world tasks and workflows. Even after a successful go-live, post-launch support is necessary to ensure a smooth transition. Establish a dedicated support team to address any technical issues, provide user assistance, and fix potential bugs. Regular system reviews and updates will help optimize performance and address any evolving business needs.





# 9 Ways to Incorporate AI Into Your MFG Strategy



**Production Automation**



**Streamlined Connectivity**



**Quality Control**



**Process Automation**



**Demand Forecasting**



**Supply Chain Optimization**



**Improved Labor Allocations**



**Increased Energy Efficiency**



**Improved Security Monitoring**

## How to Started with AI

Everyone wants AI, but nobody knows how to incorporate it in a meaningful way to see actual ROI. The best way to think about AI, is to think of it as a tool. Sit down with your team and innovate. Stop shopping for tools, instead, sit down as a team and draft all the “ideal” scenarios where AI or predictive intelligence could help you in a perfect world. Then review those scenarios with a developer and/or your ERP partner. Let them help you turn ideas into realities. That is the power of AI, the possibilities for automating, reducing costs, and innovating are limitless.

# Driving real results in a world where there's no time for downtime.

The manufacturing landscape is more complex than ever before. Whether it's meeting customer demands, accommodating new vendor requirements, competing with off-shore manufacturing models, or keeping up with changing industry regulations and compliance; today's manufacturers need an ERP that can keep up with them, not hold them back. While there are many ERPs on the market, very few are designed for your industry out-of-the-box. Here are some incredible recent results from American Manufacturers who invested in Infor CloudSuite Industrial:

"Jobs are improved  
**30%** faster."

- Oliver Packaging

"We've achieved  
**98%** order accuracy"

- Tucker Door & Trim

"Our customer win  
rate increased by **30%**"

- Endries International

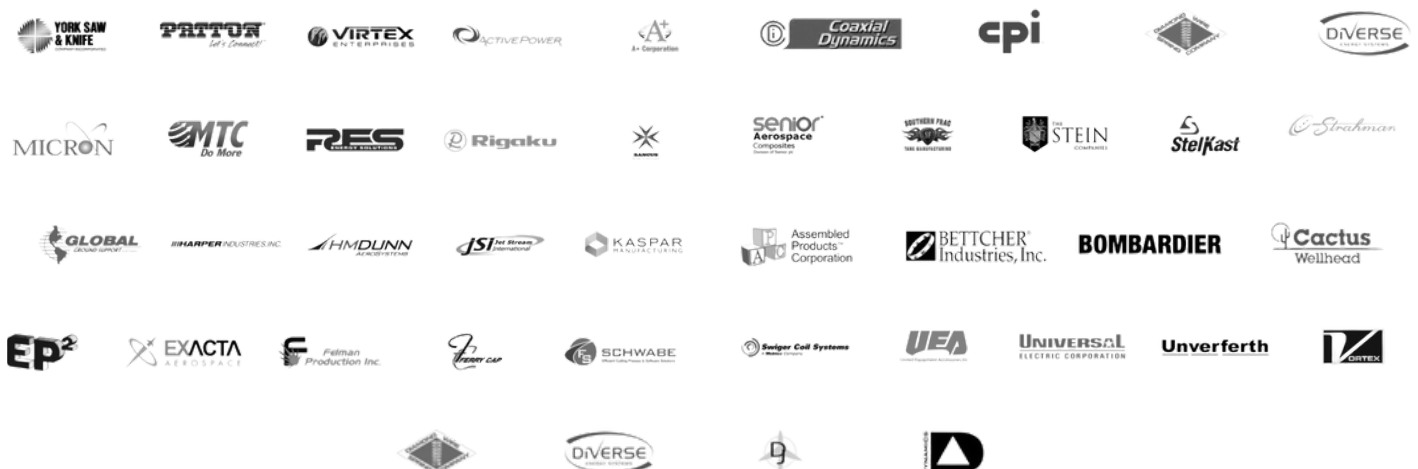
"We've increased productivity  
by over **25%**."

- Tate's Bake Shop

"We cut configurator  
overhead by **50%**"

- Daikin

Join the 400+ leading American manufacturers who trust Infor CloudSuite Industrial ERP and Decision Resources to help them grow their business.





Next Steps

# Ready to Modernize Your Manufacturing Operations?

Contact us today to evaluate Infor CloudSuite Industrial ERP for your business. Our team of ERP experts look forward to helping you make the best decision for your business.

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