CASE STUDY

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SAP Abandoned for Odoo USA Flexibility

Open Source Integrators came to the rescue of this manufacturing control supplier by replacing SAP Business One with USA Odoo. The integration brought new features, flexibility, and freedom while reducing the client's total cost of ownership, all to maintain the client's commitment to provide high-end industrial components along with superior service.

The client is one-third of a specialized industrial component sales and service organization, with two integrated sister companies. The three companies are tightly coupled due to their recent previous existence as divisions within the same company.

This expert team sells, delivers, installs, and maintains industrial components and systems. Products offered include pumps, valves, controllers, industrial boiler equipment, and natural gas regulators.

Today, the three distinct companies have similar operations in the same office space and have chosen to use common back office resources for their accounting, technology, warehouse and facilities functions, which has provided an excellent platform on which to build their individual businesses. This allows them to leverage an economy of scale from their investments in this infrastructure, both in fixed assets and use of personnel. The client acts as the technology coordinator for the consortium.

Situation

The full organization had implemented SAP Business One, and found that it struggled to support their business operations. The client wanted a better approach to e-commerce, integrated operations management, inventory, CRM, sales, fulfillment, and other key functions. They had used the prior system before exploring other options, and were frustrated with its black-box design and inability to be modified to effectively support their business functions. They wanted a flexible Open ERP solution that could be manipulated to promote their competitive advantage.

After their experience with proprietary software, the client strongly preferred an Open ERP approach. They conducted a thorough investigation of the options, decided USA Odoo was the right choice for them, and engaged Open Source Integrators to help them proceed.

" *We spent years getting our data models and workflow where we wanted them. It was exciting to see the integration of my sales team's internal efforts integrated with Dun & Bradstreet and Hoovers, and how it was doing to drive new revenue. This successful partnership is mapping an exciting path forward for our team.*

Approach

The client engaged Open Source Integrators to work with them to build a complete Open ERP system, and the team used OSI's approach to USA Odoo implementation.

STEP 1
Analyze FGY's Business Systems

During this step, OSI and the client conducted a one-week workshop to analyze the requirements and needs for a complete system; simultaneously, Open Source Integrators conducted technology transfer to the client's staff. Given that the client is comprised of three separate but related organizations, this week of work had to address the specific needs and requirements of each business unit, as well as create coherent common design that would meet their joint needs.

Together, OSI and the client partners identified the criteria for success, documented a target schedule and budget, and began prototyping a new system.

STEP 2
Optimize Critical Areas and Processes

Once the workshop was complete, OSI and the client worked to optimize critical areas. The team built and agreed upon a functional specification that addressed the key business processes.

The business goals included:

+ Specialized sales management tools

+ Commission and margin calculation tools

+ Accurate and complete accounting

+ Migrate data from SAP Business One to USA Odoo

+ Build a flexible system that can be extended with e-commerce, geospatial analysis, and other advanced technologies

+ Gain insight into operations, sales and customer care

STEP 3

Build Odoo Systems to Automate Processes

The client worked closely with the entire team to create a plan that addressed the schedule, scope and budget. Leadership worked hard to manage change and promote system acceptance from stakeholders, even as the software design was being finalized.

Change management activities included active testing from end-users, and leadership's flexibility and support of those requests that were truly required for daily work. End-user stakeholders played critical roles and were flexible to adjusting their way of working when necessary to match system setup.

The client had limited staff availability to configure the software and the environments, and contracted Open Source Integrators to handle many of the identified customization, configuration and installation tasks. At the same time, OSI helped the client hire a staff member that could assist with a number of these tasks at their headquarters.

OSI and the client proceeded to work through the implementation together, with weekly status meetings and monthly project analysis. The end result was a successful implementation that passed a rigorous set of User Acceptance Testing (UAT) that proved the software was ready.

STEP 4

Provide Transition Assistance

Team members completed their work as planned, managing scope, schedule and budget effectively. Open and honest communications were key to this success, and continue to this day.

There was some scope increase during the project, but the budget and schedule impact was managed due to other work items being complete ahead of schedule.

Open Source Integrators' staff assisted in testing, training, and staffing/hiring. Leadership performed change management tasks with the entire team, to great success.

Results

The team migrated successfully from SAP Business One to USA Odoo in less than seven months. The client's team is using their new system to manage their businesses, adding new functionality in addition to closely mimicking the valuable areas that were set up in the proprietary software. They are now positioned to effectively grow their business, with a system that supports and amplifies their competitive advantage.

According to the company's owner and president, one of the most notable benefits from their engagement with Open Source Integrators has been the integration of their marketing efforts with USA Odoo.

The client is successfully using USA Odoo for:

+ Accounting

+ Sales

+ CRM

+ Inventory management

+ Shipping

+ Purchasing

+ Geospatial sales analysis

> " *I've been hiring consultants for over 20 years, and know that mistrust and other problems can be inherent to the process. OSI's leadership worked tirelessly to fully appreciate and address my concerns and come up with reasonable solutions along the way.*

Summary

With the help of Open Source Integrators, the client accomplished their goal of migrating to USA Odoo, managing scope, schedule, and budget carefully. They have embarked on a phase two project, which includes integrating Magento for a direct sales channel, extending the GIS analysis, and generating new reports.

The client's bold move to leave a legacy platform and successfully move USA Odoo clearly demonstrates the readiness of USA Odoo, the effectiveness of OSI's implementation approach, and most notably the power of the client's faith and follow-through to their innovative vision. The client's full business group are now gaining the competitive advantage they have invested in.

The Open Source Integrators Difference

Open Source Integrators stands in a category of one.

Open Source Integrators provides decades of experience in Open ERP spanning a wide range of industries. From small, independent entrepreneurs with a big idea to national infrastructure efforts, you can rely on the scalable ERP expertise from Open Source Integrators around the clock.

As a top independent Open Source Integrator in the US, Open Source Integrators provides customers a unique combination of open source business process consulting and improvements in industries ranging from construction and utilities to manufacturing, engineering, the service sector and direct to consumer.

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