



Your ERP Adventure: A Guide for Preventing Jurassic Disasters

WIPFLi
CPAs and Consultants



Your Presenters



Michael L. Vaccarella, CPA, CGMA, CM&AA

Managing Director

Private Equity and Transaction Advisory Services

Wipfli LLP

Chicago, Illinois

- Nearly 20 years of public accounting experience, including 10 years with mergers and acquisitions
- Helps coordinate buy-side and sell-side transaction support and consulting for corporations, family offices, private equity funds, and their portfolio companies
- Passion for practical solutions in the most complex environments

Your Presenters



Jason Muhlstein

*Partner and Technology Consulting Services Leader
Wipfli LLP
Minneapolis, Minnesota*

- Over 18 years of experience working with manufacturers and distributors, leveraging technology and data to improve overall business performance
- Helps organizations anticipate technology trends and convert to more modern platforms when practical and feasible
- Frequent author and speaker on how to ensure technology projects are successful and how to maximize ROI on IT spend

Your Presenters



Jeff Wulf

Partner, Organizational Development and Governance

Change Management Expert

Wipfli LLP

Chicago, Illinois

- Over 20 years helping organizations successfully embrace and adapt to the inevitable changes every business faces
- Develops holistic consulting strategies aimed at improving overall performance
- Offers a unique blend of expertise in leadership and organizational development, business process improvement, and change management



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Overview

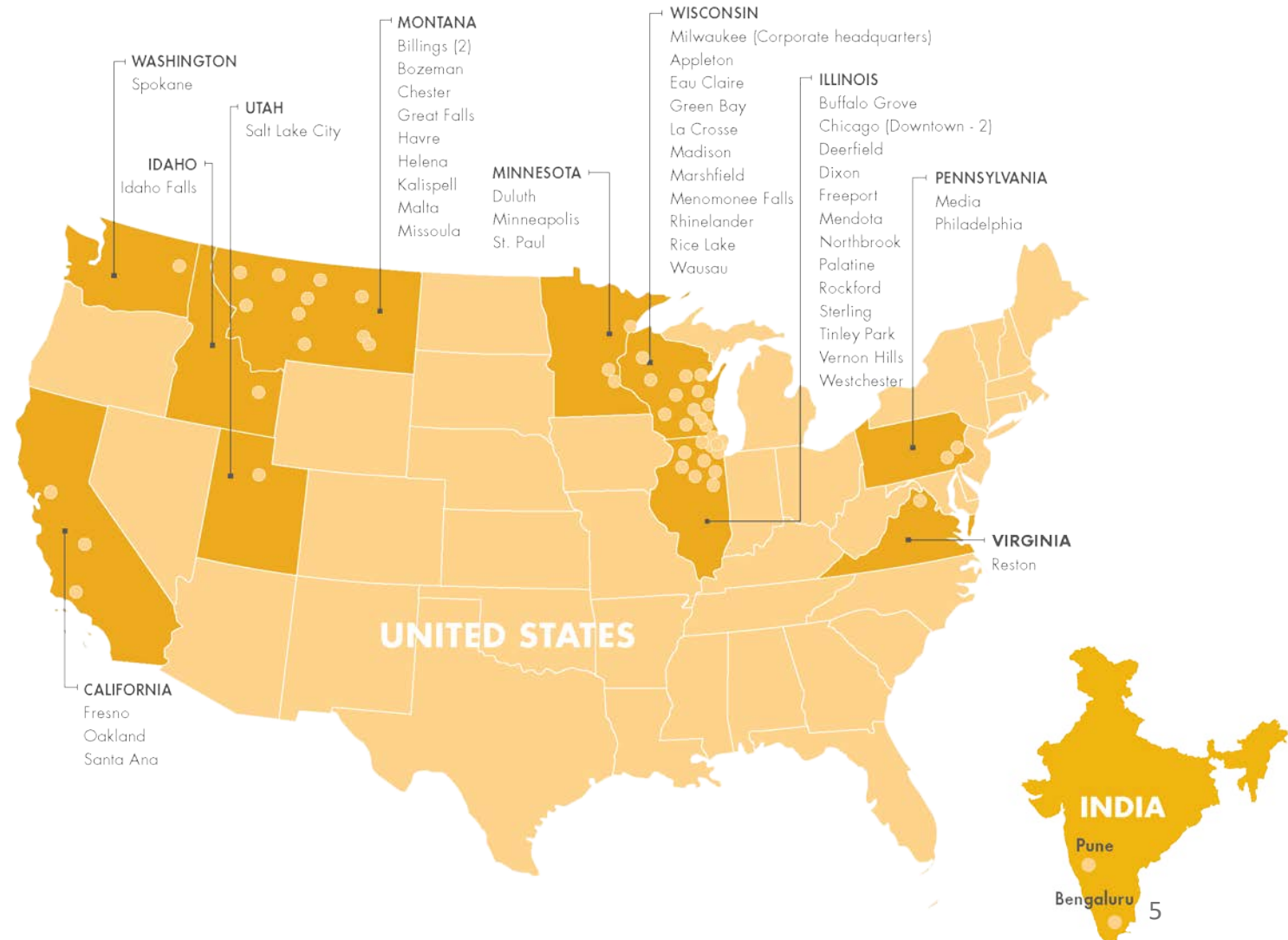
- **Learning objectives**
 - Know the terrain
 - Be better equipped
 - Bring your team
- **Live discussion with expert guides**
- **Q&A**
- **Additional Resources**

Wipfli LLP – CPAs and Consultants



- Firm founded in 1930
- Headquarters in Milwaukee
- 240+ partners
- 2,000+ associates
- 49 U.S. offices
- 2 India offices

- Private equity services
- Fund, TAS, portfolio company
 - Manufacturing and Distribution
 - Health Care
 - Technology
- ACG growth champion
- PERT sponsor





Preventing Jurassic Disasters

Polling Question #1



Your ERP Adventure – An Expert Discussion



What are the most critical items private equity firms must address *before* moving forward with an ERP implementation?

Your ERP Adventure – An Expert Discussion



You talked about the importance of getting everyone ***committed*** to the endeavor.



Why is this so critical to a successful implementation, and what guidance do you have for leadership to help accomplish this?

Your ERP Adventure – An Expert Discussion



What can be done to help portfolio companies *prepare* for the issues that come with technology *change*?

~~UNPREPARED~~





Preventing Jurassic Disasters

Polling Question #2



Your ERP Adventure – An Expert Discussion



From an overall technology implementation perspective, what are the most critical items that will contribute to **success** and lead to more immediate return and value?



Your ERP Adventure – An Expert Discussion



A successful implementation involves ***persistent change management***.

What specific change management tools and techniques can be used to assist in managing change and keeping people engaged?



Your ERP Adventure – An Expert Discussion



When can firms expect to see the **benefits**? Throughout the implementation, what metrics can be used to demonstrate **value**?



Questions



Have more questions?



Contact us:

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- Jason Muhlstein – 952.548.6744 or jmuhlstein@wipfli.com
- Jeff Wulf – 630.368.7038 or jwulf@wipfli.com

Additional Information



- Read article: [*Avoiding ERP Implementation Disaster: Five Best Practices*](#)
- Download our complimentary e-book: [*All In: Achieving ERP Implementation Success Across Portfolio Companies*](#)
- Read our complimentary e-book: [*Why Change Management Is Key to Technology Implementation Success*](#)
- Contact us for a complimentary organizational readiness session

Thank You



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