A (New) Look at User Participation in an ERP

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ABSTRACT

Engaging users in an enterprise resource planning (ERP) implementation is not new. Research espouses the benefits of user participation in such major projects, and often takes it for granted that users are involved. What is missing is an assessment of how best to engage users, when to involve them, and how much decision-making and influence they are allowed. This paper highlights findings from a single case study, and encourages future research to develop a newer understanding of user participation. Key components of successful user engagement include an integrated team approach, a balance of workload, the need for expertise at all levels, organizational and project commitment, effective decision-making, the reduction of competing resources or projects, and the maintenance of user participation post-implementation. As ERP systems mature and companies upgrade and maintain their systems, the concept of user participation should remain a core component of ERP research and practice.

Keywords: Boundary Spanning, Enterprise Resource Planning (ERP), Enterprise Software, User Influence, User Participation

INTRODUCTION

The engagement users in ERP implementations is an activity that is often taken for granted, and is considered a critical success factor for ERP success. But what is the best way to engage users? How can user participation best be put into practice? There is an abundance of research that tests the possible correlation between user participation and system success. However, instead of testing for relationships and correlations, it may be best to shift to research on best practice for user participation (Harris & Weistroffer, 2009; Mao & Pan, 2009). This article extends this line of inquiry and examines effective user participation strategies.

This paper is based on doctoral research of Gibbs (2010), and although the research was limited to a single case study, the findings illuminate several key factors and implications for successful user participation in an ERP. These factors can be grouped into major themes that include an integrated team approach, learning (individual and organizational), workload, expertise, commitment, decision making, competing resources, post-implementation user participation.

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AN INTEGRATED TEAM APPROACH

Making users part of the design and/or implementation team in an ERP is not new. However, the Gibbs (2010) case study highlighted a unique situation, in which users and project team members were co-located. They shared a physical location for almost two years. Human resources, finance, materials management, IT, and project leadership worked cooperatively in a large computer room throughout testing and implementation. This situation did not come without resistance, but as the project progressed, the team members found the arrangement most suitable to development and testing of the new ERP.

One danger that will arise in any team is groupthink. It is helpful to have everyone in the same room, but teams can also talk themselves into solutions or developments that may not be optimal, or beneficial to the organization. A strong project manager may be able to keep themselves somewhat removed from the situation and provide guidance or offer other ideas to the team. In the Gibbs (2010) study, a strong project management, coupled with co-location, helped to keep the project moving in a coordinated direction.

Furthermore, the participative decision making literature also confirms that group decision making can be more effective, especially with complex tasks, as a larger pool of knowledge increases performance and motivation (Latham, Winters, & Locke, 1994). This leads directly into the learning that the organization and its members experience during the ERP implementation.

INDIVIDUAL AND ORGANIZATIONAL LEARNING

An ERP is a mighty complex system, with almost countless integration points. If consultants are used as part of the implementation project—either from the vendor or an organization like Deloitte—they will help the project team members learn to an extent. But if the culture is such that growth and learning are encouraged, the users and project team should be allowed to “play” in a test environment and develop a deep knowledge of the system. This knowledge will help them adapt their business processes to the new system, rather than giving up and trying to force the system into the current model.

Users cannot be expected to immediately understand the new ERP system, nor can they know the intricacies of a major systems project. They must therefore be given the opportunity to grow into and learn their role. This learning applies to both those on the technical side and end-users who were engaged in the project. Bjerknes and Bratteteig (1995) labeled the phenomenon “mutual learning”, as the varied groups grew together and made collective decisions.

Chen, Chen, Jiang, and Mitchell (2009) reported that user influence leads to technology learning at an organizational level, and this research is supported by Salaway’s (1987) study on organizational learning during user-developer design. While the participants in this study were learning the new system, the organization was also growing and learning as it adjusted to the implementation of an integrated system. In the Gibbs (2010) study, the greatest learning came during the project when users and technical professionals were engaged in a collaborative work environment. The co-location helped to foster the growth and learning, as users and project team members were able to create a true synergistic environment.

WORKLOAD AND RECOGNITION

Case study research has shown that over-extending users can be detrimental to the implementation success of the ERP (Barker & Frolick, 2003). The Barker and Frolick case showed that, by requiring users to maintain both the legacy system and dedicate countless hours to the ERP, their expertise was wasted because they were simply over-extended. In
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