



consulting



CASE STUDY

INDUSTRY LEADING MANUFACTURER LOOKED TO MODERNIZE THEIR ERP SYSTEM TO KEEP UP WITH GROWTH AND PRODUCT INNOVATION

An industry-leading manufacturer of high-performance attachments for use with skid-steers, tractors, and excavators has been using an outdated legacy ERP system. To sustain their growth and maintain their position as innovators in the industry, they turned to Copley Consulting, a division of Judge Consulting Group, to evaluate, recommend, and implement a more robust and modernized ERP solution.

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THE CHALLENGE:

Client Recognized Increasing Gap Between Customer Demand, Organizational Needs, and an Aging, Legacy ERP System

The client, known for providing the toughest, most reliable, and safest equipment in the market for over 40 years, was constrained by their legacy SAGE ERP system. The heavily modified system had become unreliable and insufficient for the growing organization. They needed a more robust ERP solution capable of managing supply chain, inventory, financials, and APS scheduling. In a dynamic business environment, the limitations of the current ERP system were a significant barrier to efficient operations and further growth.



THE SOLUTION:

Implementing a New CloudSuite Industrial ERP Solution to Sustain Future Growth

Copley Consulting met with key stakeholders, performed a deep dive on the current system, and provided recommendations for ERP solutions as the client's full-implementation partner. After evaluating the Infor CloudSuite Industrial (CSI) solution, Copley determined that Infor CSI with a SaaS deployment would meet the client's needs and offer flexibility through additional solutions. To complement CSI, Copley also implemented Factory Track Shop Floor, Infor OS: Mingle and Document Management, and Infor's Configure Price Quote (CPQ) applications. Copley's approach included shared program management, with a team of financial, operational, and technical Copley consultants working directly with the client's internal team.

Using their extensive Infor expertise, Copley developed detailed implementation plans. Implementation services included:

- **Project Planning and Management**
- **Data Conversion Workshops**
- **Business Process Workshops**
- **Configuration and Personalization**
- **Product Enhancements and System Integrations**
- **Application Training**
- **Full Documentation Sharing**
- **Post Go-live Support**

For optimal delivery, the implementation was divided in two primary Phases with Phase I focused on the most rapid deployment possible without compromise of quality and staff readiness. Phase II was focused on further enhancing system capabilities and ensuring long-term sustainability and scalability. The following focus for each phase is outlined below:

Phase I: Initial implementation of CSI, Infor OS: Mingle, Financial Reporting, and Factory Track Shop Floor.

Phase II: Implementation of CPQ, Shopify Integrations, and Salesforce Integrations.



"The implementation of Infor OS: Mingle improved team collaboration, streamlining communication and information sharing."



THE RESULT:

Streamlined Production Processes and Enhanced Operational Efficiency with the Implementation of Infor CSI and Infor OS: Mingle

The new ERP system provided real-time tracking and management of inventory, reducing stockouts and overstock situations. The implementation of Infor OS: Mingle improved team collaboration, streamlining communication and information sharing. Enhanced document management facilitated more organized record-keeping and improved access to critical information. Most importantly, the solutions are scalable, accommodating the company's growth and evolving needs.

Phase I ran on schedule and under budget, with strong support by the Copley team in the implementation of CloudSuite Industrial, hosted in the Cloud. Factory Track Shop Floor, and Infor OS: Mingle and Document Management transformed the organization's business operations, addressing previous limitations and positioning the company for future growth and success. Phase II included a successful implementation of Infor CPQ, Factory Track, and integration between Shopify and CSI. Copley continues to engage with the client for ongoing support and any future enhancements to support their continued growth and business needs.

