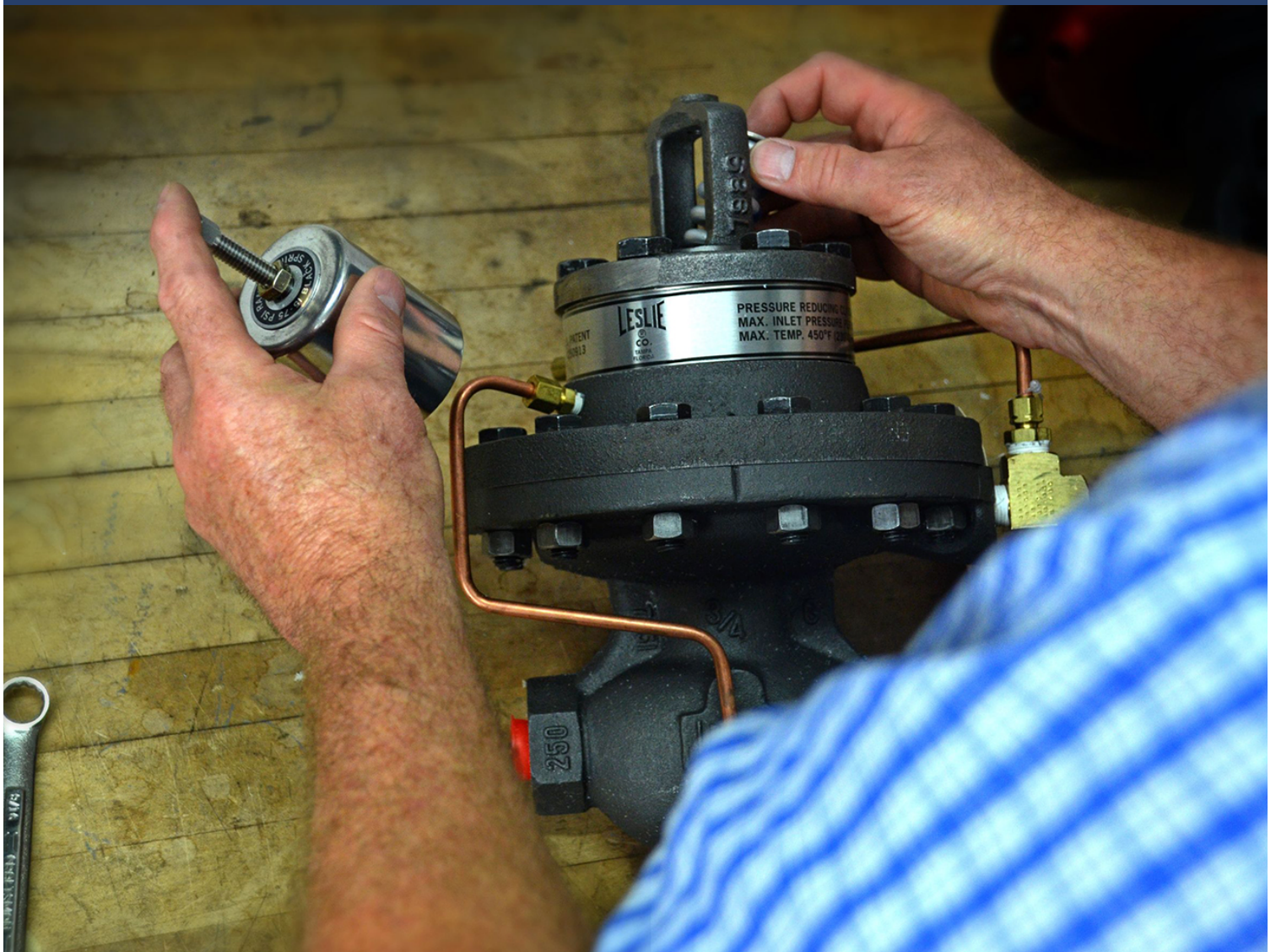open source
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SAP ABANDONED FOR ODOO FLEXIBILITY

Frew Process Group, AB Young and Gasco used Odoo to replace SAP Business One and gained new features, flexibility and freedom while reducing the Total Cost of Ownership (TCO).

The Frew/Gasco/AB Young (FGY Team) specializes in selling and distributing industrial components.

The three companies are tightly coupled due to their previous existence as divisions within the same company.

This expert team sells, delivers, installs, and maintains components and systems, focused on industrial and commercial markets. Products offered include meters and sensors, valves, controllers, industrial boiler equipment, and 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 provides 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.

FGY Vision

Provide High-end Industrial Components and Superior Service

> SCOTT YOUNG, PRESIDENT OF FREW PROCESS GROUP

Situation

FGY wanted a better approach to e-commerce, integrated operations management, inventory, CRM, sales, fulfillment, and other key functions. They used SAP Business One before exploring other options, and were frustrated with its black-box design and inability to be modified to effectively support their business functions. FGY wanted a solution that could be manipulated to promote their competitive advantage.

Functional Highlights

+ Custom Sales Functions

+ Fine-Tuned Customer and Shipment Tracking

+ Tightly Integrated Customer & Market Data Sharing between 3 Companies

+ GIS Sales Analysis

Competitive Advantages to Automate

+ **Specialized sales functions** that matched their unique sales cycle. This included detailed commissions tracking, the ability to group the orders together by contract, and outside sales team management to provide just a few examples of sales-related operations the team wanted to optimize.

+ **Quick and effective delivery tracking tools** to support the 3 company's operational advantage for superior customer service.

+ Although the three companies now exist as separate entities, they gain a strong advantage through **sharing customer information and market data**. FGY required a custom function to synchronize all customer and market data between the three customer systems. A regular update cycle was needed to keep all three systems up to date with the latest changes and additions.

+ The FGY team required **visual mapping capabilities for customer records** on the three company systems. Specifically, the FGY team wanted to use a geographic information system (GIS) software, an extension to the system database, and a 3rd party geo-encoding tool. This would provide unique insight into their customer base and a foundation for more effective sales tactics.

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

Approach

The FGY Team engaged Open Source Integrators to work with them to build a complete ERP system. The team used OSI's approach to Odoo implementation.

Analyze

During this step, FGY and OSI conducted a 1 week workshop to analyze the requirements, assembled a high-level framework for development, and identified key areas requiring change; simultaneously, OSI conducted technology transfer to FGY staff. Given that FGY is three separate, closely 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, the FGY and OSI partners identified the criteria for success, documented a target schedule and budget, and began prototyping a new system.

Optimize

Once the Workshop was complete, FGY and OSI worked to optimize critical areas. More detailed analysis was required to assure the well-defined, actionable development specifications, could be successfully completed within budget and schedule. The team built and agreed upon a functional specification that addressed the key business processes.

Due to the large scale of the project, careful change management practices were necessary for success—This was identified early, and managed carefully.

The business goals included:

+ Specialized sales management tools

+ Commission and margin calculation tools

+ Accurate and complete accounting

+ Data Migration from SAP Business One to Odoo V7

+ Synchronized CRM tools, allowing visibility into Customers between the three companies

+ 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

Automate

FGY worked closely with OSI to create a plan that addressed the schedule, scope and budget of the project. FGY leadership worked hard to manage change and promote system acceptance from stakeholders, even as the software design was being finalized. OSI provided detailed project reporting, allowing FGY to appropriately analyze and proportionally share costs between the three companies.

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 current processes when necessary to match system setup. OSI used appropriate change management tools, including Training and User Acceptance, to ensure that expectations were met, and the FGY team was ready for change.

The project team (FGY and OSI) used the tasks and plan built in Step 1 (Analyze) to manage the system configuration and customization. Work was managed in an agile manner, with frequent progress reviews, functional demonstrations, and testing cycles. Progress and review checks verified that work executed adhered to the initial design or change order and that budget and schedule were met or adjusted. The team used standardized reporting tools, meeting the high expectations of FGY management.

FGY had limited staff availability to configure the software and the environments, and contracted OSI to handle many of the identified customization, configuration and installation tasks. At the same time, OSI helped FGY hire a staff member that could assist with a number of these tasks on site.

FGY and OSI proceeded to work through the implementation together, with weekly status meetings and monthly project analysis. The last exercise before going live was a rigorous set of User Acceptance Testing (UAT) that proved the software was ready to support FGY's requirements. After this final check, Frew experienced a very smooth deployment that stabilized quickly, and with few issues.

Transition

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.

Scope increased during the project, but the budget and schedule impact was managed carefully, and partially mitigated by other work items being complete ahead of schedule.

OSI staff assisted FGY in testing, training, and staffing/hiring. FGY leadership performed Change Management tasks with the entire team, establishing trust and buy-in.

Results

FGY is successfully using Odoo for:

+ Accounting

+ Sales

+ CRM

+ Inventory Management

+ Shipping

+ Purchasing

+ Geospatial Sales Analysis

More importantly, the team migrated successfully from SAP Business One to Odoo in months.

The FGY 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.

Success Factors

1	Dedicated Team
2	Effective Testing Team
3	Leadership & Stakeholder Flexibility
4	Regular and Open Team Communication

Summary

The Frew/Gasco/AB Young Team accomplished their goal of migrating from SAP Business One to Odoo, managing Scope, Schedule and Budget carefully.

FGY embarked on a phase II project, which includes integrating Magento for a direct Ecommerce based channel, extending the GIS analysis, and generating a broad range of sophisticated new reports using the Pentaho platform.

FGY's bold move to leave a legacy platform and successfully move to Odoo clearly demonstrates the effectiveness of the OSI approach to Odoo implementation and most notably the power of FGY's faith and follow-through to their innovative vision.

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