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ERP Transformation: Who really owns it and why it matters

Transformation Whitepaper

ERP programmes are one of the most complex, expensive, and disruptive undertakings a business can go through. Yet the reasons they succeed or fail have very little to do with software. They come down to people: how leaders are aligned, how decisions get made, and whether the organisation is genuinely ready to change.

Earlier this year, Investigo brought together a group of senior finance, technology, and operations leaders for a closed roundtable on exactly this topic. The conversation was candid, drawing on real experiences across ERP programmes of different sizes, sectors, and outcomes.

This paper sets out what the group discussed and where they found common ground. It is aimed at leaders who are either preparing for an ERP transformation or are already in one and want to pressure-test their approach..

The technology is rarely the problem

This point came up early and kept resurfacing throughout the discussion: ERP programmes rarely fail because the system does not work. They fail because the organisation around it is not ready.

When you implement an ERP, you are not just replacing software. You are exposing how your business actually makes decisions, where accountability sits, and whether your senior team is genuinely aligned or just politely agreeing in meetings. For many organisations, that exposure is uncomfortable.

An ERP doesn't create misalignment. It just makes existing misalignment impossible to hide.

The implication is significant. Before any conversation about system selection, implementation partners, or go-live dates, leaders need to have honest conversations about how their organisation actually works. If decision-making is slow, siloed, or politically charged in normal operations, an ERP programme will make things worse.

Value has to be the anchor

One of the clearest themes from the roundtable was how quickly ERP programmes drift when there is no compelling, shared view of what success actually looks like.

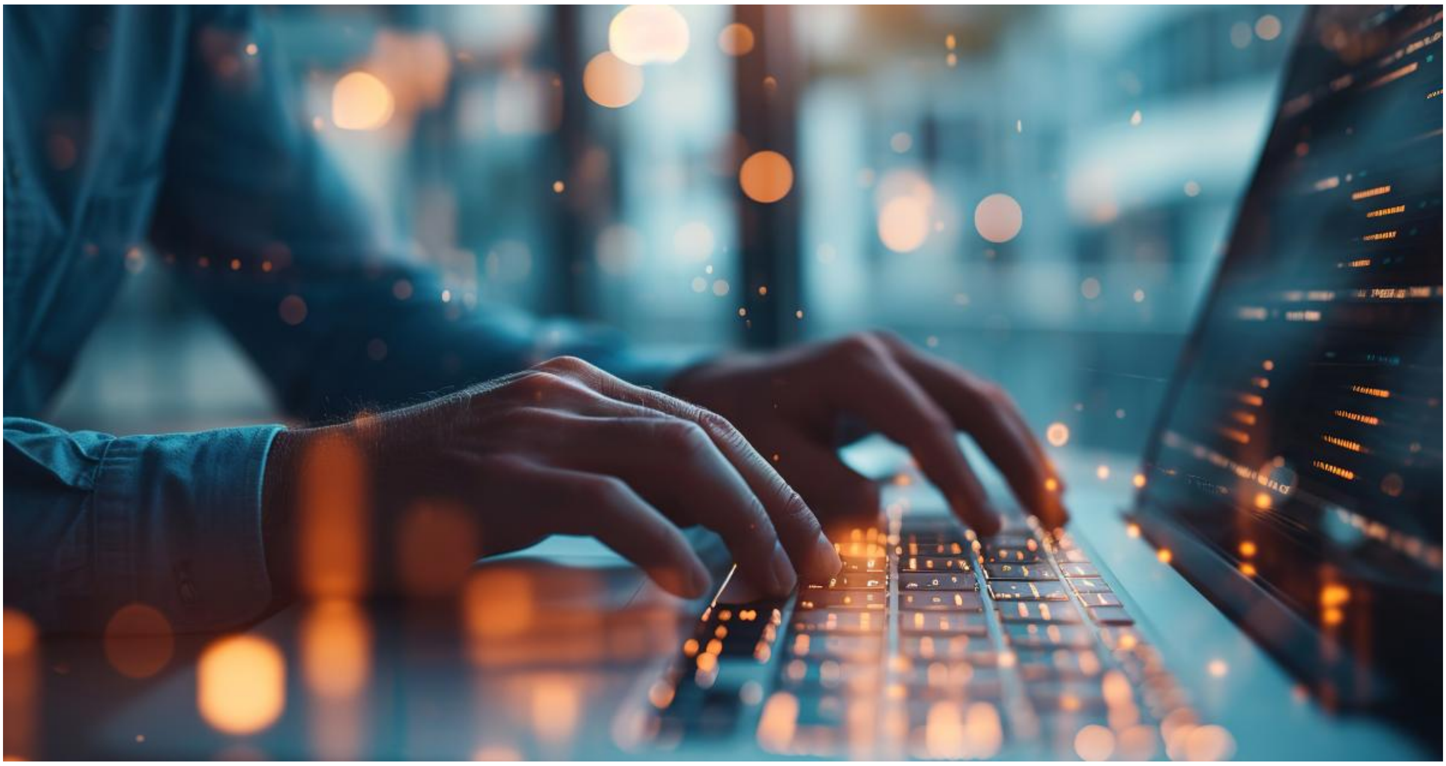
This sounds obvious, but in practice, it is harder than it seems. Different stakeholders have different priorities. The CFO wants efficiency and cost control. The CIO wants a clean, scalable architecture. Operations wants speed and reliability. The business units want to keep doing things the way they have always done them.

The group argued that a well-constructed value case needs to speak to all of these audiences, not just the board or the budget committee. They identified four dimensions that tend to resonate:

- Efficiency: the measurable productivity and cost impact
- Value protection: improved governance, risk management, and financial control
- Effectiveness: better data, faster insight, and more confident decision-making
- Engagement: a better experience for the people who will actually use the system day to day

When the value case is narrow or purely financial, it loses people. The finance team might stay bought in, but the operations manager whose team faces six months of disruption needs a different reason to care.

Critically, the value case also needs to be revisited regularly, not just articulated once at the start. As programmes evolve and pressures mount, leaders need something to return to when trade-offs get difficult.



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Ownership is where most programmes quietly start to fail

The group spent a significant amount of time on ownership, and it became one of the most discussed topics of the evening.

ERP programmes involve a web of interconnected responsibilities: programme governance, business process design, data quality, change management, technology delivery, and ongoing operations after go-live. In theory, someone owns each of these.

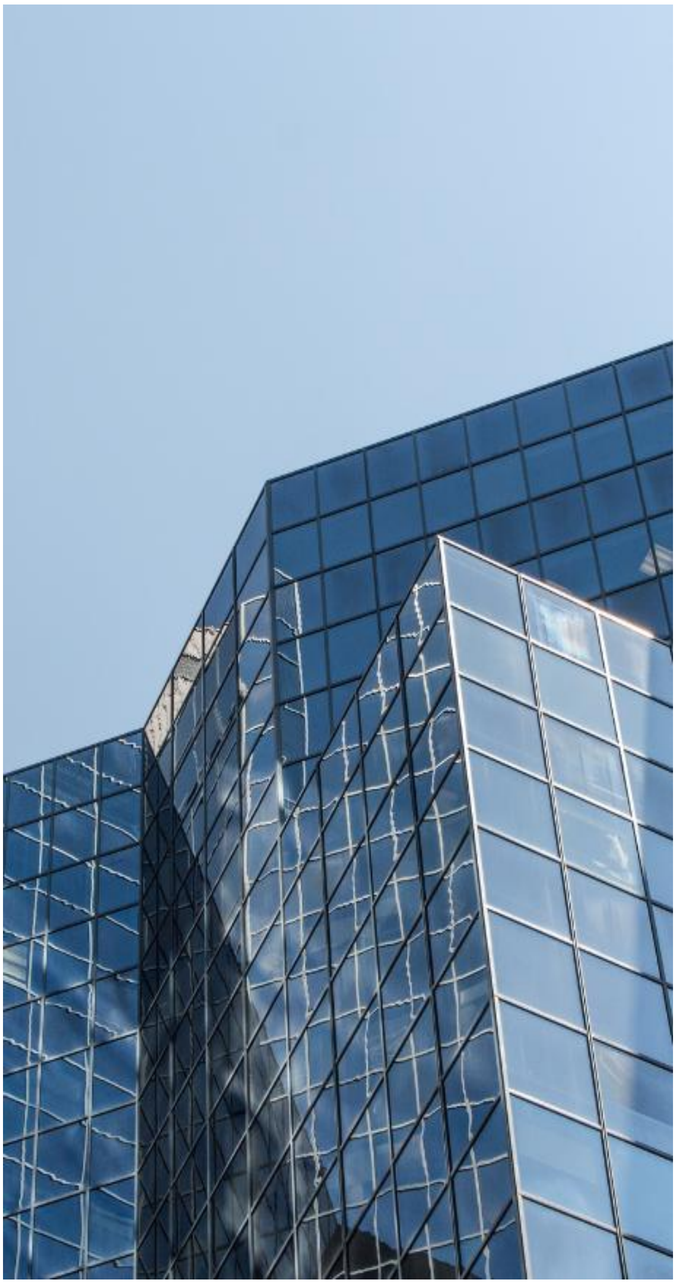
In practice, the boundaries are often blurred, assumed rather than agreed, and rarely tested until something goes wrong.

Where ownership is unclear, blame cultures fill the gap.

The panel highlighted a few patterns they have seen repeatedly. First, ownership tends to fragment as programmes grow. What starts as a clear structure at the outset becomes harder to maintain as roles shift, sponsors change, and timelines slip.

Second, there is often a gap between who nominally owns something and who actually has the authority and bandwidth to act on it. Third, joint ownership between functions such as Finance and IT, or IT and the business, can work well, but only if the boundaries are genuinely agreed rather than left vague.

The practical recommendation from the group was to make ownership visible. That means not just documenting it in a RACI or a governance chart, but actively reinforcing it in how meetings are run, how decisions are escalated, and how progress is communicated.



Governance that actually works

Governance is one of those words that appears in every programme plan and means something different to everyone. The roundtable tried to pin down what good governance actually looks like in practice.

The short version: governance needs to be fast, firm, and trusted.

Fast, because one of the most common ways ERP programmes lose momentum is through slow decision-making. Issues escalate, wait for a steering committee, get deferred, and accumulate. By the time they are resolved, the knock-on effects have multiplied.

Firm, because governance only works if decisions are backed. A steering committee that reopens resolved questions, or a sponsor who signals ambivalence after a decision has been made, will undermine the programme faster than almost any technical issue.

Trusted, because the people doing the work need to believe that the governance structure is there to help them, not just to assign blame when things go wrong.

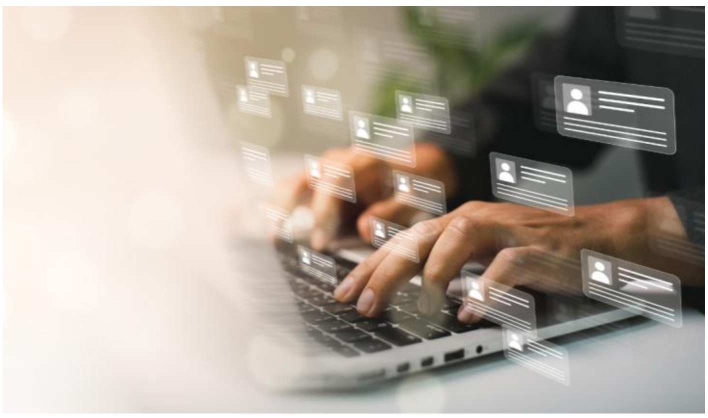
The group pointed to User Acceptance Testing as a particularly common pressure point. UAT is where the gap between what was promised and what was delivered becomes visible. Without strong ownership and genuine trust across the leadership team, UAT can become a forum for relitigating earlier decisions rather than a constructive validation phase. Getting the governance conditions right before UAT begins matters enormously.

The reality of modern ERP: clean core, customisation and AI

The group were sceptical of some prevailing narratives around modern ERP. The clean core idea is appealing, but it is not achievable for every organisation. Industry context matters, and implementation partners do not always set realistic expectations about how much customisation will actually be needed.

On AI, the consensus was cautious optimism. The potential is real, but AI on top of poor data, unclear processes, or weak governance will not fix those problems. It will amplify them. The fundamentals have to come first.

There was also broad agreement that ERP is no longer a one-time transformation. Organisations that treat go-live as the finish line tend to fall behind. The ability to absorb and build on continuous change needs to be designed in from the start.



The behaviours that separate successful programmes

Towards the end of the evening, the group reflected on what the leaders behind successful ERP programmes actually do differently. Five behaviours stood out.

1. They make trade-offs early

Scope creep and deferred decisions are among the most predictable causes of programme failure. Leaders who are willing to make hard calls about what is in and what is out, before design begins, set their teams up to deliver. Those who avoid the hard conversations tend to face them later, under much greater pressure.

2. They stay in design long enough

There is a temptation, particularly among senior leaders, to set direction and then step back. But ERP design involves choices that have long-term consequences, and those choices need informed leadership input. Leaders who disengage from design too early often find themselves unhappy with the outcomes and unable to easily change course.

3. They reinforce value relentlessly

Not just at launch, but throughout the programme. When things get hard, when timelines slip or budgets come under pressure, the value case is what keeps the organisation committed. Leaders who keep returning to why the programme matters tend to maintain alignment better than those who treat the business case as a document produced once for approval.

4. They model the change they are asking for

If the message to the organisation is that this transformation requires new ways of working, but the leadership team continues to operate exactly as before, that contradiction is noticed. The group were direct on this point: leaders who visibly adopt the new ways of working send a more powerful signal than any communication campaign.

5. They go slow to go fast

This was perhaps the most counterintuitive observation from the evening. The impulse in most organisations is to move quickly, particularly when there is board pressure or a competitor is already live on a new system. But leaders who invest time upfront in getting alignment, clarifying ownership, and building trust tend to see fewer derailments during delivery. The early work pays dividends later.

What to focus on next

For leaders either entering an ERP programme or trying to course-correct one that is already underway, the roundtable discussion pointed to a handful of priorities.

- Establish a shared narrative about value, one that speaks to different stakeholders and can be revisited when trade-offs get difficult.
- Define decision rights and escalation paths before you need them, not in the middle of a crisis.
- Map the web of ownership and make it visible. Do not assume that because responsibilities are documented somewhere they are genuinely understood and accepted.
- Align on trade-offs before design begins. The choices avoided at the start tend to reappear later, more expensively.
- Invest early in data and integration. These are almost always on the critical path and almost always underestimated.
- Build trust across the leadership team. It is not a soft concern. In ERP programmes, trust is the currency that allows difficult conversations to happen and decisions to stick.

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Investigo works with organisations across finance, technology, and operations to support complex transformation programmes.

If you would like to discuss how the themes in this paper apply to your own ERP journey, please get in touch.

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