

Milestone Methodology Contributes to Successful ISM Implementation for Large Distributor

OTC Industrial Technologies, an industrial supplier of parts and services, recently underwent the implementation of two major software solutions across two business units. The large project was unique and challenging in many ways—but also highly successful.

Roger Abrahams, Senior Vice President—IT, the executive sponsor for the project, described the project and work of the implementation partner, Single Source Systems as “Phenomenally organized. Methodical. Nothing bothered the consultants. Complications were like water off a duck’s back.”



OTC is a one-stop-shop supplier for comprehensive industrial and manufacturing solutions. It includes 60 unique brands, 3 distinct industries with 60 branch locations across 40 states.

For OTC, the driving objective behind the project was to move business operations to the cloud and standardize solutions across a broad corporate landscape of multiple business segments and brands.

The challenges

The size of the project and diversity of needs across the business units made it a challenging undertaking. The Single Source team stepped up and met—or exceeded—expectations. Some of the unique aspects include:

Scale. The project included two of the three OTC business segments, Air Supply Group (ASG) and Pump, Motor, Technology Segment (PMT). Products range from air compressor systems to industrial pumps and motors. Differing business models had to be addressed and commonalities found.

Solutions. Two different solutions were rolled out at once: Infor CloudSuite Distribution (CSD) and Infor CloudSuite Service Management (ISM). The project also involved migrating from a hybrid deployment to Infor’s cloud platform. NSA, an Infor channel partner, managed the implementation of CSD. Single Source Systems oversaw the deployment of ISM.

Implementation partners. NSA and Single Source Systems have partnered on numerous implementations of CSD and ISM. That experience proved helpful. “The OTC implementation epitomized the success partners can have when working together as a single entity,” says Patrick VanPutte, president of NSA.



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NSA championed the upgrade from SX.e to CSD and worked very closely with the Single Source project team to ensure the implementation of ISM dovetailed with the CSD deployment. “The go-live was a ‘non-event’ and that’s what all parties, especially the customer, want for any ERP deployment,” adds VanPutte.



The mission: To provide a level of service to our customers that adds productivity and value to their business.

Service expertise. Because one business segment performs depot repair and the other segment performs field service, a broad range of expertise was needed. With nearly 40 years of working with service management companies of all types, Single Source was able to suggest answers that would accommodate both business units.

Timing. The initial phase of OTC implementation was completed in February 2024, only 13 months after the plan was established, a remarkable feat for an initiative of this scope and scale.

Education. The implementation team “trained the trainers” so those individuals could go back to their various business units and train users on new policies and workflows, with an emphasis on consistency.

Milestone Methodology. Abrahams credits much of the success to Single Source’s Milestone Methodology.

The methodology breaks the process down into milestones, with regular communication and sign-offs on each objective before the team moves to the next set of deliverables.

“Having all of the predefined paths all mapped out for us in a very clear, organized way—with all of the major milestones noted—made it super simple for us to see where we were and where we were going,” says Abrahams.

Elements of success:

Ongoing communication. Regular team meetings and continuous communication were important for keeping the project on course and on schedule. Gordon Smith, Single Source implementation consultant for the PMT team, met with team leads three days a week. These were working sessions to document processes and use cases. “It could be an overwhelming amount of information to process. But part of my job was to help keep it all in perspective and manageable. Sometimes, I would need to help everyone to pull-back to the 10,000-ft level to see the big picture,” he says.

Project Management. In addition to two implementation consultants, a Single Source project manager, Sandy Rhodes, technical services consultant, also helped keep the multiple elements on track. “Everyone was highly engaged and conscientious about completing their assigned tasks. It was really a team effort with OTC,” she says.



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Conference room pilots. This step tests workflows and data management of different applications. For OTC, three conference room pilots were held, each one lasting several days. “These were very valuable for us,” says Abrahams. “The first one we basically walked through ISM functionality out of the box and identified any gaps. The Single Source team was very easy to work with. They spelled out options and benefits, then the team decided on any modifications that would be needed. They listened to us explain our business,” says Abrahams.

Command centers. For go live, OTC set up two in-person command centers of key people on hand to triage and resolve any last-minute questions or errors that arose once the new solution was in operation. The command centers only needed to be in place for one week as the new normal quickly settled into a routine. “The easy transition and smooth operation of the command centers was really a sign of OTC’s commitment to the project. It went as expected. There were no showstoppers, only minor issues to work through,” says Michael Williams, Single Source implementation consultant working with the Air Supply Group.



Group effort. The team participants all worked together to make the project run smoothly. “All three companies really came together and did their part,” says Marty Rhodes, president of Single Source Systems. “I’m proud of our team—and our Milestone Methodology, that we’ve been perfecting for nearly 40 years. Once again, it provided sound methodology, proving that even very large projects can be ultra-organized and efficient,” Rhodes adds.

That’s what the Single Source Systems team strives to achieve with every implementation, large or small.

Learn more about Single Source and the Milestone Methodology [here](#).

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For nearly 40 years we have been helping manufactures enhance their operations through technology and specialized tools to enhance productivity. We deliver no-surprise deployments and high-impact results.



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