

THE 2019

Digital Transformation, HCM, and ERP Report



THIRD STAGE
CONSULTING GROUP

Disclaimer: Third Stage Consulting is an independent ERP consulting firm. Third Stage has no financial ties to ERP, HCM, or digital transformation technology vendors, either directly or through parent companies or affiliates. Accordingly, the below analysis is completely technology-agnostic and 100% free of vendor bias.



INTRODUCTION

Our team – led by our CEO and Founder Eric Kimberling – has conducted annual research of the ERP, HCM, and digital transformation markets. This research and corresponding reports were intended to provide benchmarks and an understanding of industry trends related to enterprise implementations and digital transformations.

This report reflects our findings from our most recent study of organizations implementing enterprise technologies as part of their overarching business transformations.

METHODOLOGY

Unlike past reports, which tend to focus on “average” metrics of questionable value to most organizations, this most recent study identifies more meaningful metrics – both quantitative and qualitative in nature. More importantly, this most recent study analyzes and dissects the correlations between digital transformation success and failure, as well as the strategies and tactics that have the highest correlation with success versus failure.

This report focuses on deeper and more meaningful analysis of both quantitative and qualitative findings.



In analyzing data for this year's report, the Third Stage Consulting team engaged in the following approach:

- ▶ *Analyzed quantitative and qualitative data from 1,000 digital transformations over the last 20 years.*
- ▶ *Participants in the study represent a combination of clients of Third Stage Consulting, as well as companies that are not clients.*
- ▶ *Data from digital transformations completed in 2018 or beyond were weighted more heavily than older initiatives.*
- ▶ *There was an intense focus on analyzing underlying trends and correlations, which relied on a deeper understanding of each of the projects in the study.*
- ▶ *The study disregarded metrics that aren't of value to organizations or don't provide solutions to digital transformation success.*

- ▶ *The study focused on examining variables beginning with corporate strategy, all the way through to digital transformation planning, execution, and post-go-live.*
- ▶ *Rather than focusing on single “average” numbers that don’t apply to most organizations, this study instead focuses on identifying the ranges that most organizations fall into.*
- ▶ *The study was conducted by a technology-agnostic team to cover SAP, Oracle, Microsoft Dynamics, SuccessFactors, Ariba, Workday, and several dozen other digital transformation technologies.*

THIS STUDY AND REPORT REPRESENT THE FIRST OF ITS KIND IN THE DIGITAL TRANSFORMATION, ERP, AND HCM INDUSTRY.



QUANTITATIVE METRICS AND FINDINGS

Below are some of the key quantitative metrics that we found to be of most interest to CXOs and project teams engaging in digital transformations. Rather than providing single average numbers for each of the areas below, the study provides ranges that most organizations fall into.



IMPLEMENTATION TIME AND COST

For better or for worse, implementation time and cost are two of the most important metrics that CXOs and project managers use to measure success. Our study finds that although there are a number of variables that impact actual time and cost, these metrics are fairly consistent among companies of similar size and complexity.

Implementation duration

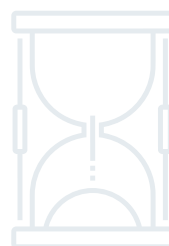
For mid-size companies ranging from \$50M to \$1B in annual revenue, most implementations require 14 to 16 months. For companies larger than \$1B, this number increases to 31 to 34 months. It is important to note that these figures are trending higher in the last two years, largely because the major vendors are concurrently releasing newer, less proven, and less mature flagship ERP products in the market. This is creating additional complexities and difficulties during their customer's implementations.

MID-SIZE COMPANIES

\$50M - \$1B

14-16 months

IMPLEMENTATION



LARGE COMPANIES

OVER \$1B

31-34 months

IMPLEMENTATION

Implementation cost

Actual implementation budgets are largely irrelevant since this number varies wildly based on company size. For this reason, we normalize implementation costs to be expressed as a percentage of company revenue. Mid-size companies with revenue under \$1B realize a total cost of ownership of 3% to 5% of their annual revenue. Companies with revenue over \$1B fall in the range of 2% to 3% of annual revenue.

The numbers are smaller for larger organizations largely because they have more economies of scale on their transformations. In other words, there is a minimum cost that must be spent on any transformation regardless of size, so larger organizations experience lower costs when expressed as a percentage of revenue.

MID-SIZE COMPANIES

UNDER \$1B



3% - 5%

OF ANNUAL REVENUE



LARGE COMPANIES

OVER \$1B



2% - 3%

OF ANNUAL REVENUE

Variables with strongest impact on implementation time and cost

Of the dozens of behavioral and qualitative factors we examined, our research shows that the following variables had the highest correlation with implementation time and cost:

- **Scope** – those with broader scopes of functional areas experienced higher durations and costs.
- **Magnitude of change** – those that made the biggest changes to their organizations experienced the highest durations and costs. Those that migrated from a mainframe-based system to a modern solution, for example, were much more likely to experience higher implementation durations and costs than those with more incremental changes.
- **Complexity of operations** – those with more business units, operations in more countries, and other complexities their business models experienced the highest durations and costs.
- **Level of organizational change support** – those that invested the most in organizational change experienced lower duration and costs.
- **Level of software customization** – those with more customization experienced higher durations and costs.

The above areas are the variables that had the strongest correlation and linkage to implementation duration and cost.



OPERATIONAL DISRUPTION

One of the greatest costs and risks for any digital transformation is operational disruption after go-live. However, these costs and risks can be difficult to predict and mitigate without the proper expertise. Of all the metrics we quantified in this study, this one had the highest degree of consistency over the 1,000+ digital transformations studied.

Definition of operational disruption

Operational disruption is defined as a “material” disruption to operations as a result of the transformation. For example, being unable to ship product or close the books are the two most common operational disruptions. This metric does not include smaller and more common disruptions, such as employee frustration, short-term inefficiencies, and other relatively minor disruptions.

Of all companies in the study, 51% to 54% experienced a material operational disruption at the time of go live. The duration of disruptions varied greatly, ranging from a few weeks to several months. In addition, the costs of these disruptions increased the initial cost of the implementation from anywhere between 50% and 300% of the cost to implement the transformation.

OPERATIONAL
DISRUPTION

51% - 54%

OF COMPANIES



INCREASE OF
INITIAL COST

50% - 300%

Variables with the strongest impact on operational disruption

The below variables had the strongest and most direct impact on the level of operational disruption that organizations experienced:

- **Clarity of defined business processes** – those that spent more time defining clear business processes prior to or early in their transformations were less likely to experience disruption.
- **Investment in organizational change and training** – those that implemented more complete and effective change strategies were less likely to experience disruption.
- **Level of executive alignment among key stakeholders and the transformation project team** – those that rated higher in executive, stakeholder alignment, and project team alignment were less likely to experience disruption.
- **Time and effort spent during user acceptance testing and conference room pilots** – the more thoroughly a company tested its processes and systems, the less likely they were to experience disruption.

Companies that excelled in these four areas were the most likely to experience successful digital transformations with the least amount of operational disruption.

▶ **Areas with low correlations with implementation duration, cost, and operational disruption**

The following variables had the lowest impact – positive or negative – on the metrics outlined above:

- **Type of software implemented** – though SAP and Oracle implementations tend to have higher implementation durations and costs, this statistically appears to be more of a function of the size and complexities of the organizations that implement them rather than the technology itself.
- **Specific system integrator used to implement the software** – in other words, the specific system integrator.

In other words, these variables statistically have very little impact on the outcome of client's digital transformations. They are relatively neutral to transformation success or failure.



TOP CHALLENGES

EXPERIENCED BY TRANSFORMATION EXECUTIVES AND PROJECT TEAMS

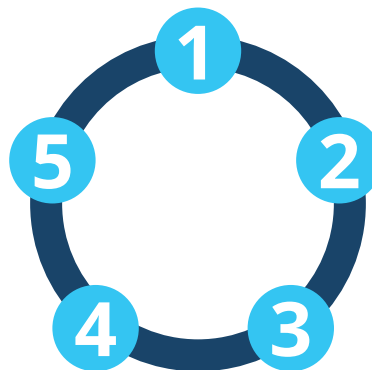
In our study, we also ranked the top difficulties that executive sponsors and their project teams experienced. In the study, we focused on the root causes rather than the symptoms of transformation challenges. These were the top 5 difficulties faced by executives and project teams, ranked in order of the frequency that the challenge occurred:

#1 Organizational change and the “people” part of the transformation.

Whether it was intentional resistance or more subtle misunderstandings regarding the transformations, organizational change was the number one concern and challenge among executives and project teams that had recently gone through a digital transformation.

#5 Difficulties with data migration.

Cleansing, mapping, and moving legacy data to the new ERP system was a common challenge among organizations that recently completed a transformation.



#2 Transformation misalignment with strategic objectives.

Many CXOs and project teams struggled with transformations that did not support or align with their broader strategic objectives.

#4 Clarity of business processes.

Organizations that did not take the time to clearly define their future state business processes struggled much more than those that did. Those that relied more on “best practices” and “off the shelf” software functionality to drive their transformations actually experience the most difficulties.

#3 Difficulty managing or addressing deficiencies with the system integrator.

Companies that completely outsourced their deployments to an ERP system integrator, VAR, or reseller were more likely to experience challenges than those that took more active ownership of their transformations.

Interestingly, despite common belief that they are the biggest challenges facing digital transformations, the following did *not* make the list of the most common difficulties experienced by transformation teams:

Implementation duration and cost, which was determined to be a symptom of those challenges in the top 5 rather than a root cause in and of itself.

Technology vendor selected, which showed no statistical correlation between software chosen and success or failure rates.

System integrator selected, which showed no material statistical correlation between specific system integrators and their success and failure rates.

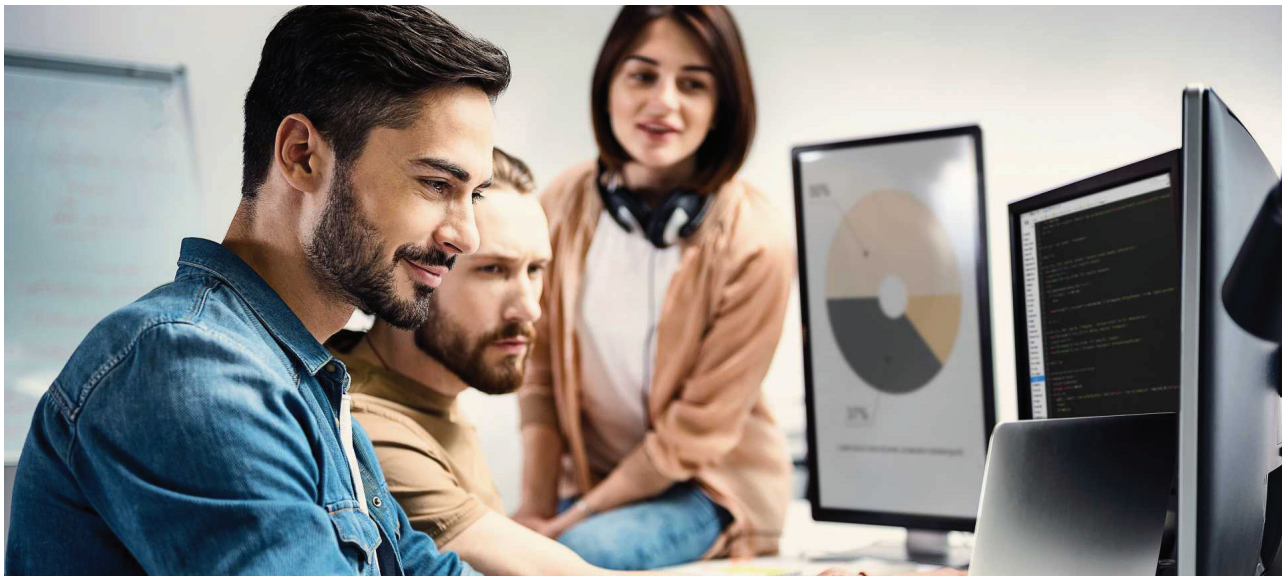
Technology configuration and integration, which was a common challenge, but not nearly as common as other factors revealed in the study.

Too much software customization, which was determined to be a symptom of poor organizational change management rather than a root cause in and of itself.



QUALITATIVE FORECAST OF INDUSTRY TRENDS

Based on the quantitative and qualitative findings of this study – as well as the trends in the data over time – the Third Stage team identified a number of trends that are likely to quickly materialize in the coming years.



1

THERE WILL BE A SHAKEUP IN THE TOP ERP SYSTEMS

The first prediction is a shakeup among the top ERP systems in the market. Our technology-agnostic top ERP systems ranking for 2019 is based on a number of factors, such as average business value delivered and implementation time, cost, and risk. While an organization's individual needs should be the most important decision factor, the ranking can provide a good comparison of various options.

This year's ranking underscores the constantly-changing nature of the ERP software industry. In years past, Salesforce and Workday would have never been considered ERP systems per se, but they make the top of the list this year. And ERP systems such as Microsoft Dynamics 365 and NetSuite fared much better in this year's rankings than in years past. In contrast, incumbents such as Oracle did not make the list of top ERP systems. This all points to a very dynamic enterprise technology space in the coming year.

2

TRADITIONAL ERP AND HCM IMPLEMENTATIONS WILL BECOME INCREASINGLY OBSOLETE

While we are publishing a list of top ERP and HCM systems, we are also predicting the obsolescence of ERP implementations as we know it. Implementing ERP like it's 1999 didn't work then – and it's definitely not working now. In 2019, more companies will find success by broadening their view of enterprise technology.

Instead of viewing ERP and HCM implementations as a way to automate back-office functions or to automate already inefficient business processes, more technologically innovative organizations will find success by breaking with the status quo. For example, more forward-leaning organizations are finding great success focusing on the third stage of ERP rather than falling short. Others are engaging in true digital transformations vs. traditional ERP implementations, which is the wave of the future. As a result, traditional ERP implementations will continue to fade in 2019.



3

MORE COMPANIES WILL FOCUS ON TWO-TIER DIGITAL TRANSFORMATION APPROACHES

The increasing focus on digital transformation will also enable more two-tier implementation approaches. Instead of assuming that a single software solution or single vendor can deliver the breakthrough capabilities required for the future, more companies are finding value in a two-tier approach involving multiple systems for different functions.

For example, divisions of larger parent companies are finding value in the two-tier ERP implementation approach. The parent company may be rolling out a standardized back-office system such as SAP S/4HANA or Oracle Cloud ERP, while the divisions may roll out more customer-facing systems that are more aligned with their culture and needs. The proliferation of technology options and integration tools makes this a viable option for many organizations we work with.

4

IMPLEMENTATION READINESS WILL BECOME A PREREQUISITE FOR TRANSFORMATION SUCCESS

Too many companies have jumped blindly into their ERP and HCM implementations without a clear plan or organization. We can expect that to change in 2019, largely because more companies are apt to deploy multiple technologies when compared to the past. We are seeing more companies begin with a “Phase 0” implementation readiness stage to build a strong foundation for implementation success – before the meter starts running on the army of implementation consultants.

5

CLOUD ERP WILL REACH THE TIPPING POINT OF ADOPTION

Some have been touting the death of on-premise ERP for years now. We were not among them – until this year. We don’t know that on-premise will ever completely go away, but 2019 will be the year that cloud ERP reaches the tipping point of adoption. Software vendors and the entire ERP ecosystem are all investing too much money in their flagship cloud products for this not to influence adoption rates. Next year will be the year that this materializes in very real ways.

6

DIGITAL TRANSFORMATION FAILURES WILL CONTINUE TO INCREASE

Most predictions tend to be optimistic, but there are some not-so-positive trends on the horizon as well. There are a number of broader trends that will coalesce to increase the failure rates of digital transformation initiatives.

There are a number of reasons why digital transformation failures are on the rise. For example, customers are being forced off of their legacy on-premise systems, while vendors and implementations teams are focusing too much on technology. In addition, our ERP expert witness practice has seen a marked increase in demand. These and a number of other factors point to a landscape that is likely to result in more ERP failures in 2019.





7

ERP SYSTEM INTEGRATORS WILL BE HELD INCREASINGLY ACCOUNTABLE FOR THEIR RESULTS

We recently wrote about how many ERP and HCM system integrators are rigging their clients' digital transformations. This isn't always intentional and doesn't apply to all system integrators, but track records suggest that there are many bad actors in this space.

The coming year may just be the year that organizations learn how to avoid ERP failure. They will hold their system integrators accountable by leveraging effective (and independent) third parties to manage those integrators. Just as importantly, they will begin to realize that there are plenty of viable consulting options outside the realm of Deloitte, Accenture, Capgemini, and other big system integrators. One way or another, system integrators will be forced into more accountability for actual results.

8

ORGANIZATIONAL CHANGE MANAGEMENT WILL BECOME THE KEY TO DIGITAL TRANSFORMATION SUCCESS

Organizational change management is the number one key to digital transformation success – and it always has been. The coming year will be the year that organizations begin to recognize this fact and invest accordingly.

Advances in technology have made transformations more complex. Changes to business processes, organizational cultures, and business models have made change management strategies indispensable to success. Organizations will continue realizing this as predictive analytics, artificial intelligence, machine learning, and other technological advances put more “people” pressure on digital transformations.

9

FURTHER DISRUPTION IN THE INDEPENDENT ERP CONSULTING SPACE

This last year saw disruptions in the ERP consulting space (including our CEO's departure from Panorama Consulting to form Third Stage Consulting Group), and 2019 is likely to see more. Some hold themselves out to be independent when they're really not, while others hire inexperienced consultants and fail to focus on the critical success factors that can make or break their clients' digital transformations.

The best independent ERP consultants will continue to attract the world's leading organizations as clients, while lesser successful ones will continue to struggle with employee turnover and financial distress. We also predict that the weaker consulting firms will no longer exist in 2019, so watch for a shakeout of the weaker performers.

10

DIGITAL STRATEGY WILL BECOME A PREREQUISITE FOR DIGITAL TRANSFORMATION SUCCESS

The digital transformation space is becoming more complex from a technological, operational, and organizational perspective. The proliferation of technology options and the impact on businesses is greater than it has ever been. This all points to the need for a clear digital strategy to help effectively navigate various options.



WHAT THESE TRENDS MEAN TO YOU

The constantly changing digital transformation landscape will lead to more options, complexity, opportunities, and risk. Navigating these challenges and opportunities require the help of a skilled team of independent consultants that have your best interests in mind. Companies like Third Stage Consulting can help guide you through the process.



DIGITAL TRANSFORMATION

MANDATES FOR CXOS IN 2019

The above trends and data analysis prove that CXOs, managers, and project teams need to approach their digital transformations with a fresh and more innovative perspective. Our analysis and correlations outlined above reveal the strategies and tactics that will be the most successful for the future.

Whether you are a CIO, CFO, CEO, Chief Digital Officer, Chief Transformation Officer, VP of HR, or another leader in charge of a complex transformation, these are the top strategies, tools, and tactics to help your organization pivot into the future.



Consider your entire spectrum of digital transformation options

It's easy to focus on SAP S/4HANA vs. Oracle Cloud, Microsoft Dynamics 365 vs. NetSuite, or another myopic view of potential technology solutions. But there are more viable options in the market than you may think. And there is no need to assume that only one solution can fit your needs. It is important to get a technology-agnostic recommendation of the best digital strategy for your organization.



Take control of your digital transformation

Deloitte, Accenture, Capgemini and other ERP system integrators aren't in control of your project. You are. If your SI or VAR insists on an unreasonable timeline, a bloated army of consultants, or a biased technology solution that doesn't make sense for your organization, then push back. If the recommended solution doesn't feel right or doesn't align with your strategic objectives, then take ownership. If you feel that quality assurance and third-party oversight of your system integrator will help you succeed, then do so.

You are the only one that can ensure the success of your project. Resist the temptation or pressure to hand the keys to your system integrator. They may not like your decisions, but you are the one that will be left holding the bag when the consultants are gone.



Stop overlooking the little details of your digital transformation

We recently wrote about how the little things are the cause of digital transformation failure. They may seem like little things, but they are actually very significant. Organizational change management, immature cloud ERP and HCM solutions, and inability to change your operations fast enough are just a few examples of things that can undermine your initiative.



Take a timeout to control the tempo of your digital transformation

Too many organizations rush into their transformations before they are really ready. Your chosen vendor and system integrator have a vested interest in seeing you start before you're necessary ready, so it is important to do what's right for you. Transformation readiness is one of the most important aspects of your digital transformation, so be sure not to bypass this critical success factor.



Bottom line: only you can decide whether your digital transformation succeeds or fails

Over the years, some CIOs have used vendors, system integrators, and consultants as scapegoats for their digital transformation failures. They may position themselves as victims, but every CXO needs to take ownership of their digital transformation to do what it takes to ensure success.

TOP ERP SYSTEMS FOR 2019

As part of our study, we also evaluated the software vendors that fared the best across a number of categories. Though these criteria are not all necessarily aligned with the priorities of your organization, they illustrate how the software solutions compare to one another.



METHODOLOGY FOR RANKING THE TOP ERP SYSTEMS FOR 2019

We evaluated nearly 100 systems in narrowing our list of top ERP systems for 2019. In doing so, we used the following quantitative and qualitative criteria to determine the best-performing systems:

- ▶ *Market share*
- ▶ *Ease of implementation, including average time and cost*
- ▶ *Maturity of cloud solutions*
- ▶ *Flexibility of solutions*
- ▶ *Scalability of solutions*
- ▶ *Ease of integration to third-party systems*
- ▶ *Ease of organizational change management and training*
- ▶ *Strength of vendor ecosystem, such as system integrators and partners*
- ▶ *Average time to benefits realization*

The major ERP vendors are in the process of overhauling their flagship solutions as part of their migration to the cloud. This mass overhaul of the leading solutions – along with the fact that cloud ERP has reached the tipping point of adoption – has created a shakeup among the leading ERP systems.

Below are some of the top ERP systems that your organization should be considering in 2019.

#5

SALESFORCE



Long considered a leading CRM system, Salesforce is also slowly becoming a legitimate top ERP system. Financial Force and its ecosystem of integrated third-party applications has allowed Salesforce to address the broad needs outside CRM functionality.

The fact that Salesforce was built natively in the cloud is another strength. While other ERP vendors are scrambling to move legacy applications into the cloud, Salesforce is instead constantly upgrading their relatively mature cloud solution. It's flexibility and ease of implementation are two strengths that helped land the product in the top 5.

#4

WORKDAY



Like Salesforce, Workday is another natively cloud application that has slowly evolved from an HCM system to a full-fledged ERP system. We now see more organizations adapting Workday not only for traditional Human Resource functions, but also for financial, accounting, and other ERP functions.

Workday has made tremendous strides in functionality and market share in recent years. It has also moved upstream in the industry by penetrating the upper mid-market and even some larger enterprises as well. Its flexible product, ease of integration, and expanding ecosystem gives the product momentum headed into a new year.

#3

NETSUITE



NetSuite is the pioneer of cloud ERP. Like Salesforce and Workday, NetSuite was built in the cloud. Unlike Salesforce and Workday, NetSuite has always focused on addressing broader ERP functionality, including financials, inventory management, CRM, HCM, and light manufacturing.

A decade ago, NetSuite was a good option primarily for small and some mid-size companies. While this is still the case, we are seeing more demonstrated scale of the product at upper-mid market and larger organizations. It continues to broaden and deepen its functionality to meet the needs of manufacturing, project management, forecasting, and other advanced functions traditionally limited to the bigger ERP systems.

#2

SAP S/4HANA



SAP S/4HANA has a large market share, especially among Fortune 1000 companies and other large organizations. While its product is relatively immature as the company continues to migrate functionality from ECC and other legacy SAP products, it continues to be a de facto option for large organizations that want to scale and standardize.

The SAP HANA framework also offers the potential to provide better real-time analytics, machine learning, and artificial intelligence relative to other options in the market. The biggest things holding back SAP S/4HANA from the #1 spot? The system is often overkill for smaller and mid-size organization, SAP failures such as Lidl continue to cast a dark shadow, and SAP system integrators often leave major deficiencies in their offerings.

#1

MICROSOFT DYNAMICS 365



A few years ago, the Microsoft Dynamics product roadmap and ecosystem was a mess. Choosing between Great Plains, Navision, Axapta, and other options was very confusing – even among resellers and system integrators.

With the Microsoft Dynamics 365 platform, however, it finally has a cohesive cloud ERP strategy. Though the product lacks the maturity of NetSuite and other native cloud ERP offerings, it is a very flexible and scalable solution with relatively easy integration to third-party systems. Companies ranging from smaller organizations to large organizations are quickly adapting the platform.

The biggest weaknesses of the D365 offering is the fragmented and loosely managed ecosystem (choosing the best Microsoft D365 system integrator is very important), relative immaturity of the cloud solution, and flexibility that can be a curse during a transformation. Large companies looking to standardize operations or move to a centralized shared services model may not find the product to be a good fit.



WHICH TECHNOLOGY DIDN'T MAKE THE LIST OF TOP ERP SYSTEMS FOR 2019?

There are a lot of really good ERP systems in the market, so it was hard to narrow this list to just five options. Here are a few other systems that scored extremely well, particularly in specific niches and industries:

- **Infor**, which rates particularly well in retail, distribution, and manufacturing
- **Epicor**, which rates particularly well in small- to mid-size manufacturing, distribution, and retail organizations
- **IQMS**, which rates very well in the mid-market manufacturing and distribution space
- **Delttek**, which rates well in project-based environments such as Aerospace, Defense, government, and professional services
- **IFS**, which has a strong presence in aerospace, defense, engineer to order manufacturing, and other project-management-centric organizations
- **Ariba**, which rates well in the supply chain management space
- **SAP SuccessFactors**, which rates well in the HCM space
- **Plex**, which rates very well in the automotive industry

The list could go on, but these are just a few of the additional ERP systems worth considering on your ERP long-list in 2019.

TOP ERP SYSTEMS ARE LARGELY DEPENDENT ON COMPANY SIZE, INDUSTRY, AND STRATEGIC GOALS

At the end of the day, the best ERP systems for your organization will largely be dependent on your company size, industry, and strategic goals. Where one particular system may not even make a company's top 10, that same product could be the #1 pick for another. For example, a technology-agnostic comparison of SAP S/4HANA vs. Microsoft Dynamics 365 illustrates two products that couldn't be much different.

This is where independent ERP consultants such as Third Stage can help. We help the world's leading organizations define their digital strategy, select the right software, prepare for implementation, provide implementation quality assurance, and manage organizational change.

CONCLUSION

The findings of this breakthrough study provide a clear blueprint for how you can make your digital transformation, ERP, HCM, or CRM transformation more successful than those of years past. Changing times and a history of transformation failures in the past mark a new era of transformation leadership, strategy, and execution.



About Third Stage Consulting

Founded by industry thought leader Eric Kimberling and supported by the industry's leading consultants, Third Stage brings our clients an unparalleled wealth of experience. Comprised of senior business and technology advisors, project managers, process engineers and change innovators, our team has led some of the most complex and well-known technology initiatives over the past 20+ years.

Our consulting approach and methodologies stem from the core objective of improving businesses operational efficiencies and profitability through optimizing the use of technology. Technology, in one way or another, influences every single aspect of business today. With the immense amount of technologies available, it is rarely easy to determine the best technology strategy. Expertise is needed to help determine when, where and how to implement new systems, to make use of emerging technologies and to map technology investment to a positive ROI. This is where Third Stage Consulting thrives.

Our Services



ERP Software and Digital Transformation Strategy



ERP Software Selection and Validation



Organizational Change Management



Business Process Management



ERP Implementation Project Management



ERP Expert Witness



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ERP Software Industry Research, Analysis, and Market Positioning

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