



**nio**

DIGITAL TRANSFORMATION  
INSIGHTS

# Odoo Implementation Methodology

July 2022 | [www.niodigital.co](http://www.niodigital.co)

# Foreword

Thank you for downloading this book, which will help you better understand how to implement Odoo software.

I have spent my entire career working with software known as ERP (Enterprise Resource Planning), CRM (Customer Relationship Management), SCM (Supply Chain Management), HRM (Human Resources Management) and MRP2 (Manufacturing Resource Planning) from brands such as Oracle, SAP and Microsoft. These business applications form the transactional and information backbone of all large companies worldwide, and are widely accepted to be a prerequisite to embarking on Digital Transformation.

These systems not only cost millions of dollars to implement, but need teams of highly skilled professionals to maintain and expensive annual upgrades. Therefore they have only been accessible to very large companies.

Due to advances in the world of open source and cloud technology, such systems are now available to a wider audience at a fraction of the cost. Instead of millions, the investment is in the tens or hundreds of thousands of TT dollars.

Odoo Inc. is a pioneer of this business model, and their product, aptly called “Odoo”, is the main component of our business plan - it's going to help us to achieve our mission to create a Digital Economy here in Trinidad and Tobago.

Of course, we all know that installing software is no magic bullet, to achieve Digital Transformation you will need the skills, capabilities and experiences of a partner. In my opinion, the right Odoo digital transformation vendor/partner:

- Provides experienced Digital Transformation Consulting support: A CIO service - a group of experienced professionals with access to a global network is vital to your company making the right strategic decisions. This will provide you with the best possible insights and direction for success in the future.
- Provides tailored staff training on an ongoing basis: One of the most important factors for success is educating your entire team - from the owner to the driver and everyone in between will need individualized intraining, with on-going support to help them navigate the changes digital transformation will herald.
- Is Odoo Gold certified in the latest version: Gold partners must have 3 certified consultants on staff full time AND maintain high levels of customer service in order to be recertified annually. That certification should be in the latest version - V15 is the latest edition and V16 will be out in a few months.
- Has a full-time Odoo/Python development team: As Odoo is Open Source Software, managing it requires good technical knowledge at the source code level. Almost all projects require some degree of customization, and you will not realize the full value of Odoo without this development support. One-two developers aren't enough, a stable team complete with Business Analysts, Designers, Developers and Testers is needed.
- Provides 24/7 Support and Maintenance: You may not think that you need this now, but with accelerated technology, business today is 24/7 - consider remote working, online portals and many other customer, supplier and employee touch points.

Please keep these points in mind as you search for your Digital Transformation partner. In the next few pages, you will find additional information, which I hope will help you.

**Lorcan Camps**

Founder & CEO

July, 2022

# About Nio

## Our Mission

**“To help create and sustain a Digital Economy within Trinidad & Tobago.”**

To achieve this, we offer a Digital Business Platform comprising best-in-class open source software along with:

- **Digital Economy Accelerators** - Odoo Cloud ERP + industry solution accelerators to completely digitalize businesses.
- **Digital Transformation Services** - consulting, onboarding, mentoring, education & 24/7 support services to help companies along in their digitalization journey.
- **Digital Training Academy** - upskilling of professionals to operate a Digital Business Platform to improve business performance.
- **Digital Jobs** - creation of new roles to leverage the Digital Business Platform to increase revenues, reduce costs and improve service delivery.
- **Digital Business Network** - connect to a global digital ecosystem for mutual benefits.

## Nio Digital achieves Odoo Gold Partner status

[Port of Spain, Trinidad & Tobago. 1 April 2022]

Odoo Inc., a leading provider of all-in-one open source business software for companies worldwide has named Nio Digital Limited as its latest Gold Partner.

The award recognizes technical excellence and commitment to helping businesses succeed in their Digital Transformation journey. With over 3,500+ partners globally, Nio is now amongst the top 7.5% of partners globally, and the only Gold Partner in Trinidad and Tobago.

“Nio is the most experienced partner that we have in Trinidad & Tobago. Their focus and understanding of our clients’ problems and their track record of delivering high quality service is outstanding.”

**Alejandra Vela,**

Senior Account Manager for Latin America at Odoo Inc

# About Odoo

## Fits small and large companies alike

Odoo's mission is to provide a range of easy to use business applications that form a complete suite of tools to accompany any business need. Odoo gives millions of companies easy access to the software they need to run and expand their business.

Odoo has developed 30 key business applications which are regularly upgraded. In addition, a community of more than 1500 active members, has contributed another 16,000+ apps to cover a wide variety of business needs.

Odoo is the most installed business software in the world (source: Odoo.com). It is used by over 7,000,000 users worldwide ranging from startup companies (1 user) to large enterprises (300,000+ users).

## What makes Odoo different?

A smooth and friendly user experience built to ensure fast and seamless adoption.

Fluidity, full integration and customisation, meet the needs of even the most complex companies.

Odoo's flexibility means that apps can be added according to the growth of your company, adding one app at a time as your needs evolve and your customer base grows.

Thanks to the open source community, Odoo is actively maintained by a large base of developers to meet evolving customer needs and provide new, innovative applications.



# Odoo is positioned to disrupt the Market

## With a unique value proposition

Odoo provides everything a business needs to operate with a top-notch user experience.

- **CRM** apps for, Digital Marketing, Sales, Website, eCommerce, POS, Field Services and Helpdesk.
- **HRM** apps for Employees, Performance, Recruitment, Absence Management, Payroll & Productivity.
- **ERP** apps for Accounting, Purchasing, Inventory, Products, Service, Projects, Manufacturing and Warehousing.

Odoo apps work together seamlessly, giving you the ability to automate and track everything you do, centralized, online, and accessible from anywhere with any device.

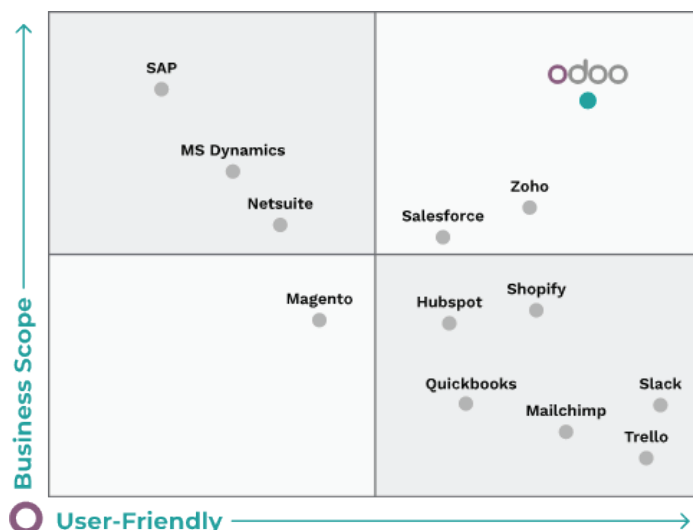
The open-source development model has allowed us to leverage thousands of developers and business experts to build the world's largest ecosystem of fully integrated business apps - all at the lowest possible cost.

With a modern and elegant technical design, Odoo's framework is unique. It allows Odoo and community developers to provide top-notch usability that scales across all apps.

Usability improvements made to Odoo are automatically applied to the entire suite of integrated apps.

Finally, with regular annual releases, Odoo evolves much faster than other solutions. When you put this all together, Odoo is positioned to disrupt the market with the broadest functionality comprising 30+ integrated apps with the best user experience at a significantly lower cost than the competition.

See below Odoo's positioning in the Business Applications Market



# Our Solutions



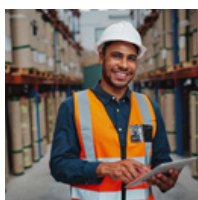
## Digital Commerce

Integrated eCommerce, digital marketing and sales with automation.



## HR Employee Portal

Quick and easy access to HR-related transactions and services.



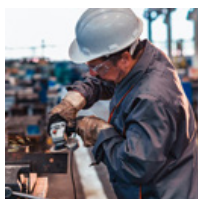
## Wholesale Distribution

Specialised wholesale distribution industry solutions.



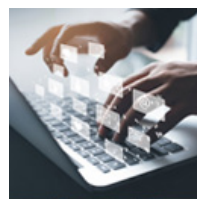
## Services

Professional and field service management solutions.



## Manufacturing

Flexible, integrated, and extensible manufacturing ERP software.



## Workspace

Email, office, conferencing and cloud solutions.

## Companies that trust us

**analogic solutions**



**AP Scott Trinidad Limited**  
"Sell You Today.....Serve You For Life"

**InterChem**

**CellMaster**



**Lange Trinidad Ltd.**

**Unipet**

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# Introduction

## Challenges in large implementation projects:

Odoo is a great software. There is no doubt about the huge benefits your customer will get from using it. The main challenge is in the implementation: **deliver expected benefits on time and within budget.**

## What we suggest to solve it?

We encourage to keep projects simple. We know how to avoid unnecessary pitfalls such as custom developments; the main source of complexities and risks of delay. It's easy to say, but very hard to do.

We know how to map specific business needs to fit the standard features, you can say “no” to customers and provide alternative solutions, in order to optimize efficiency and to get the most out of the product.

This document is our preferred methodology and it is for informational purposes. We encourage you to read it and apply any best practices that suit to your particular situation.

## How is it different?

The focus is to sell the least amount of services possible in order to let the customer get the benefits from the software on one hand and give you as an odoo partner, the opportunity to focus on new projects on the other hand. In this sense, you are aligned with your customers' objectives: on time, within budget, and without unnecessary extras. This methodology is designed to achieve this goal.

# Methodology

## Key concepts

### **PRIORITIES:**

- The customer defines the business need, the way to satisfy it is defined by the product
- The priority is the success of the project. You can challenge users demand if needed

### **KEEPING THING SIMPLE:**

- Deliver a software that covers all business flows and 80% of the expected features in a few weeks, not months. This is the first deliverable, before any specific development.
- Project managers should be able to configure and customize the software. Avoid intermediaries that are not experts in the product to make product decisions.
- Avoid custom developments if possible, launching them only as a last resort.

## **RESPONSIBILITIES:**

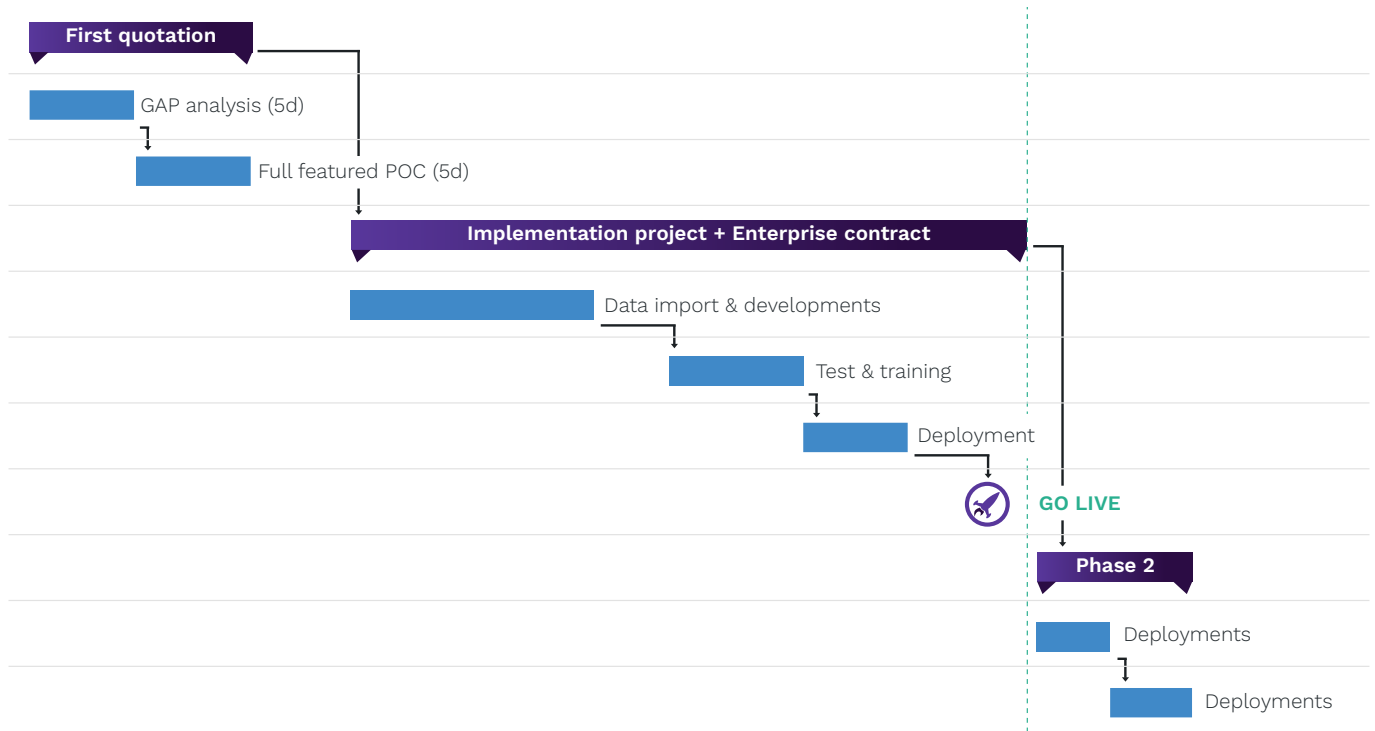
- The responsibility of a project's failure/success belongs to you, not to the customer
- You assume this responsibility, and you do the implementation and product design decisions to guarantee the success of the project and to save time to the client's benefit. Refuse to do something that goes against these objectives.

## **PROJECT MANAGERS:**

- The key success factor of any implementation is the project manager. Good decisions can save you days of work. On top of managing projects, they must be problem solvers and experts in the product.
- Invest in recruiting the best talent for the challenge and train them extensively, retaining only the top performers.
- Even when you have the best project managers, they can still miss critical details. Top Odoo experts, external to the project, can review and challenge your work at critical steps of the project (available through the partner support packs).



# Phases



## Business Need Analysis (15%)

The first step allows the project manager to compile all the relevant business needs of the company. This comes in the form of a series of interviews with department managers to analyze their work flows. The final deliverable is a prototype specification and a GAP Analysis. ([cfr example](#))

Before being delivered to the customer, **this analysis can be challenged by a top Odoo expert that is external to the project (available through the partners support packs)**. The goal is to reduce the implementation lead time by solving specific needs with standard features.

### DELIVERABLES:

- List of all business needs by business unit, and tips for the prototype
- Estimated planning, phasing and budget of the next steps



## Full Featured Prototype (15%)

The next step is to fully configure and customize Odoo to cover all business flows. The scope is defined as **“the maximum you can get from a standard solution, with customization but no development”**.

Although no data is imported and no third-party software is integrated, the software should be fully functional and the company should theoretically be able to start using it as is (even if some steps are still manual). At the end of this phase, key users should have a full demonstration as well as access to test the software against all the necessary business flows the company will need (with only 80% of the features).

### **DELIVERABLES:**

- A fully configured software that covers all business flows and 80% of the features
- Demo of the software to the key users
- GAP Analysis with a list of the remaining developments



## Data Import & Specific Development (50%)

With a fully functional POC, the customer and the project manager should be able to demonstrate the final solution to key users. As a result, you will be able to validate the remaining developments that are worth investing time on.

Split remaining developments into two groups:

1. Developments that are absolutely necessary before going into production (i.e. the customer cannot operate the business without them).
2. Developments that can be rolled out in the second deployment phase, after the project goes live (i.e. the customer can operate the business without them, but it's not efficient).

A top Odoo expert, external to this project, can review this split of features (available through the partner support packs).

At this step, you can launch three phases in parallel:

- Import of data
- Specific developments for first deployment (only the first of the above two groups)
- Third-party software integration

These three phases are handled by a team of developers and everything is tested and validated by the project manager.

### **DELIVERABLES:**

- Complete software with customer's data



## Validation & Training (10%)

Once the software is ready, you can train all users in the company. During the same phase, the customer is responsible for all final tests and should provide the green light, to allow you to go into production.

Writing the documentation is the responsibility of the customer as a good documentation should match customer's internal processes. Having the customer write the documentation is a good way to ensure they have fully tested the software in "standard practice" before going into production.

### **DELIVERABLES:**

- Customer: Final validation before production
- Project Manager: Training for all end-users



## Deployment: Go live (10%)

Once we go live, the project manager and developers should handle all issues that may arise as soon as possible.

### **DELIVERABLES:**

- Fix issues



## Second Deployment

Around one month after the first deployment, you review the list of remaining developments that were not launched in Phase 1 (i.e. developments scheduled for Phase 2: you can operate the business without them, but it's not efficient).

With the feedback from the users, the prioritization of developments will usually change (typically you will notice that 50% of the developments were not necessary and 25% of new developments have been added).

### **DELIVERABLES:**

- Iteration on: developments, deployments

# What to expect from your customers:

## Full support from top-level management

Implementation projects are difficult. They require adaptations to a lot of changes by the users and a transformation within the company. There will be challenges and difficult decisions to make. In order to succeed, you need the full support of the management of the company.

Trust and commitment from top-level management is a requirement in order to accept any project.

## Customer's Project Manager:

The customer must have an internal project manager. This person must be dedicated to the project, must have authority to make decisions on their own, and must have the leadership and autonomy to train and enforce policies for most departments.

This person should have direct access to the executive committee if needed.

## Integrate 90% of your business, not 100%:

Your customer probably chose Odoo because no other software allows for such a high level of automation, feature coverage, and integration. But don't allow the customer to journey in this direction.

Customizations cost time and money, are more complex to maintain, add risks to the implementation, and can cause issues with upgrades. Be flexible; use Odoo the way it was designed to achieve optimal results fast. Learning



how it works without trying to replicate old system(s) and workflows will yield a simplified and functional result that provides long-term efficiency.

## How to set customer expectations?

### What is the buying process for a new project?

The first quote to any new customer is a combination of Phase 1 and 2 (Prototype Specification + Full Featured Prototype). Alternatively, the customer can commit on the Prototype Specification only if their budget is low. A detailed quote for the next phases is provided as a deliverable of Phase 1. An initial budget is around 10 days; never ask to commit to a big budget or buy the whole project at this stage of negotiations.

To help the customer to decide if he is ready to work with you, you can provide a rough estimation of the TCO and different demos of the product.

### Should the customer write detailed specification before contacting you?

Don't let the customer waste time on writing detailed specifications. And never commit on full and detailed specifications solely written by the customer. This methodology is efficient because the project manager have the flexibility to solve business needs their own way. If specifications are frozen, service might not be as efficient.

If the customer wrote detailed specifications, you can use it as a source of information to understand their business needs. But never commit to such specifications.

## How to negotiate?

Try to avoid negotiation on rate/day unless the project is large (our estimation: large project > 100 days).

The best way to reduce budget is to solve specific needs using standard features, which is the goal of Phase 1 and 2.

On Odoo Enterprise, slight flexibility can be provided on the price if it is a contract of more than 100 users, or more than a year as initial contract.

Odoo contracts have conditions that are designed to be fair for the customer. We cannot handle different SLAs or guarantees per customer. We have one way of working, we do it well, but we are not organized to manage exceptions per customer. So, our legal terms and contracts are not negotiable. That way, we all save time on legal advices expenses.

# Our Solutions



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Integrated eCommerce, digital marketing and sales with automation.



**HR Employee Portal**  
Quick and easy access to HR-related transactions and services.



**Wholesale Distribution**  
Specialised wholesale distribution industry solutions.



**Services**  
Professional and field service management solutions.



**Manufacturing**  
Flexible, integrated, and extensible manufacturing ERP software.



**Workspace**  
Email, office, conferencing and cloud solutions.

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