



CLOSING THE GAP: OKEANUS' EPICOR ERP JOURNEY TO SUCCESS

Company Overview

- Headquartered: Houma, Louisiana
- Industry: Oceanographic and Subsea Manufacturing
- Established in 2013
- Website: okeanus.com

Success Highlights

- Enhanced visibility across departments
- Facilitated proactive operations
- Enhanced inventory tracking
- Optimized procurement processes
- Achieved ISO 9001 QMS compliance
- Improved alignment between companies

Business Challenges

- Gap between finance and manufacturing
- Need for streamlining processes and increasing efficiency
- Misalignment of parent company and its subsidiaries

Solution

- Epicor Kinetic Cloud

Benefits

- Ability to track inventory and materials
- Utilization of system for consolidations and big picture overview for parent company and its subsidiaries
- Unified system fostering internal growth opportunities
- Ability to efficiently share corporate resources and objectives

"There was a gap in visibility between the finance team and the manufacturing team and what they had access to, and that provided quite a bit of challenge," Emily Fazzio, Controller, Okeanus

In 2023, Okeanus Science and Technology LLC, a leader in integrated deck equipment for the Ocean Industry, embarked on a transformational journey by embracing Epicor's Kinetic ERP Cloud. Encompass Solutions, a trusted partner in ERP implementations, partnered with Okeanus to navigate this pivotal transition. This transition aimed to bridge the visibility gap between finance and manufacturing, streamlining processes, amplifying efficiency, and aligning with the corporate objective of sharing resources between the subsidiaries of Advanced Ocean Systems, Inc. (AOS), Okeanus' parent company.

Challenges Before Epicor Implementation

Before embracing Epicor, Okeanus encountered substantial hurdles. Relying on QuickBooks led to a disconnect between finance and manufacturing, hindering operational efficiency and internal collaboration. Manual reconciliation against accounting reports consumed time, necessitating a shift from a reactive approach to addressing potential risks. Emily Fazzio, Controller, discussing their challenges, highlighted this, saying, "There was a gap in visibility between the finance team and the manufacturing team and what they had access to, and that provided quite a bit of challenge."

Leveraging sister company SeaRobotics' expertise and Encompass Solutions' guidance, Okeanus strategically approached the expected implementation challenges. Collaborative training sessions and consultations helped Okeanus navigate complexities, emphasizing the necessity of investing in comprehensive training workshops. Amanda Ingram, VP of Programs, emphasized, "Having our consultants go through our training sessions every week, was a big help to us." Jim Browning, VP of Operations, noted the importance of training, saying, "The fact that we invested in getting the training from Encompass Solutions and internal SMEs... attributed to a successful implementation and user adoption."

Impact on Operations and Efficiency

Implementing Epicor's Kinetic ERP brought about pivotal changes in just a few months. Enhancing visibility across departments facilitated proactive operations, enabling the early detection of potential issues. This heightened efficiency, saved time, and empowered smoother operations through proactive problem-solving.

Progress and Lessons Learned

The Epicor implementation significantly enhanced inventory tracking, optimized procurement processes, and propelled Okeanus to achieve ISO 9001 Quality Management System compliance. While integration challenges with the company's Computer-Aided Design/Product Data Management tool persisted, the unified system fostered internal growth opportunities and improved alignment between companies. Ingram, highlighted the impact of the system, saying, "The biggest change is that the Epicor solution has helped us with our overall efficiency, being able to track inventory or knowing when we use a certain amount of material, and knowing what we have in stock and it's improving our efficiency on procurements."

Having multiple companies under AOS allows Okeanus to operate on the same system without the need for manual Excel creation. This enables them to utilize the system for consolidations, providing significant benefits for gaining a comprehensive overview of both AOS and its operating subsidiaries. Fazzio added, "Whether you want to see a standalone company operation, or all the companies as a whole is a major improvement compared to where we were before."

Reflecting on their experience, Okeanus emphasized the importance of meticulous planning, avoiding mid-year transitions, and setting clear ERP objectives. They heightened the need for patience, adaptability, and comprehensive strategies from legacy systems.

Insights for Future Success

Okeanus stressed the mental fortitude necessary during transitions, advocating for patience, calmness, and adaptability. Learning from successes and mistakes was emphasized, urging companies to remain resilient and open to evolving throughout the implementation journey, playing the long game. Browning advised, "It is a matter of patience and remaining calm because things are going to work, and things aren't going to work and be willing to take your knocks, and we have all done that."

Okeanus' transition to Epicor's Kinetic ERP represents a significant milestone. By preparing for expected hurdles, they were able to scave off unnecessary challenges in implementation and enhance adoption by the team. The insights garnered and advice shared serve as invaluable lessons for companies contemplating similar ERP transitions, emphasizing the importance of strategic planning and change management for successful implementation.