

PREMIUM EBOOK SERIES

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# Phase 1: Discovery & Assessment

*Infor M3 CloudSuite Migration*

Comprehensive current state analysis and cloud readiness assessment

4-8 week phase gate to identify gaps, risks, and migration strategy

Premium ebook for enterprise ERP transformation

## FullOnBaan

Comprehensive Infor ERP Training Programs

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# Chapter 1: Introduction & Phase Overview

Phase 1: Discovery & Assessment is the critical foundation of any successful Infor M3 to CloudSuite migration. This phase typically spans 4-8 weeks and represents the bridge between strategic planning and detailed implementation design. The primary objective is to thoroughly understand the current state of the organization's Infor M3 environment—its capabilities, limitations, customizations (MAK modifications, customer extensions), integrations, and data characteristics—and assess how it aligns with the multi-tenant CloudSuite target state.

## Why Phase 1 Matters

The Discovery & Assessment phase directly impacts project success metrics: timeline accuracy, budget predictability, risk mitigation, and stakeholder confidence. Organizations that invest sufficient time and rigor in this phase typically experience 20-30% better project outcomes. For Infor M3 migrations, this is particularly critical because M3 has a unique technical architecture with its AS/400/IBM i heritage, extensive MAK layer customizations, and industry-specific configurations that require careful evaluation.

## Phase 1 in the M3 Migration Lifecycle

- **Phase 0: Strategy & Planning** - Executive alignment, vendor selection, financial approval, program governance
- **Phase 1: Discovery & Assessment** - Current state deep-dive, gap identification, readiness evaluation, business case refinement
- **Phase 2: Design & Configuration** - Target state design, CloudSuite standard configuration, M3 BE/MEC decisions
- **Phase 3: Build & Testing** - Development, unit testing, integration testing, UAT planning
- **Phase 4: Deploy & Optimize** - Data migration, UAT execution, cutover planning, go-live
- **Phase 5: Post-Go-Live Support** - Hypercare, stabilization, knowledge transfer, continuous optimization

**Expert Insight:** Many organizations view Phase 1 as a 'box to check' rather than a strategic investment. For M3 migrations specifically, the depth of discovery around MAK modifications, MEC personalizations, and CMS customizations directly correlates with budget realism and timeline predictability. Plan for 3-5 days of on-site workshops, 2-3 weeks of system analysis, and 1-2 weeks of assessment and reporting.

## Key Phase 1 Deliverables

- Current State Assessment Report - detailed documentation of M3 environment
- Fit-Gap Analysis - functional and technical gaps vs CloudSuite standard
- MAK Modification Inventory & Disposition Matrix - all custom code analyzed
- Integration Landscape Document - all system integrations mapped (MEC, ION, API)
- Data Assessment & Cleansing Plan - data quality, volumes, remediation approach
- Cloud Readiness Scorecard - multi-dimensional readiness assessment
- Risk Register & Mitigation Plan - phase-specific risks and strategies
- Refined Business Case - updated ROI, timeline, and investment analysis
- Phase 1 Gate Review - executive decision to proceed to Phase 2

# Chapter 2: Pre-Phase Readiness

Before launching into detailed discovery activities, the organization must ensure foundational readiness: executive alignment, clear governance, adequate resources, and stakeholder commitment. This chapter addresses the organizational and structural prerequisites for Phase 1 success in an Infor M3 context.

## Organizational Readiness Dimensions

- **Executive Sponsorship** - CEO/CFO/COO-level commitment with clear decision authority and escalation path
- **Program Governance** - Steering committee structure, RACI matrix, meeting cadence, issue resolution process
- **Project Team Structure** - PM, M3 technical lead, business analyst, SMEs assigned full-time or near-full-time
- **Stakeholder Engagement** - Key users, department heads, IT operations representatives committed to workshops
- **Budget & Timeline** - Phase 1 budget approved (typically 2-5% of total project cost), 4-8 week runway secured
- **Vendor Partnership** - Infor partner/implementer allocated resources, kickoff meeting completed

**Sponsorship Checklist:** Executive sponsor must: commit 2-4 hours per month to steering meetings, empower project manager with decision authority, support organizational change initiatives, resolve cross-functional conflicts, and communicate migration vision to the broader organization.

## Project Team Composition

Role	Responsibilities	Allocation
Program Manager	Planning, coordination, stakeholder management	Full-time
M3 Technical Lead	M3 architecture, MAK/MEC analysis, infrastructure assessment	Full-time or 80%
Business Analyst	Requirements gathering, process documentation, gap analysis	Full-time