



APPROACHES TO INNOVATION AND ORGANISATIONAL CHANGE

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Executive Summary

This report critically examines the implementation of the EPICOR MRP/ERP system at MM Engineering, a leading flood defence manufacturer based in Port Talbot, South Wales. The decision to adopt EPICOR was driven by the company's rapid growth and the limitations of traditional management and bookkeeping systems, which were no longer sufficient to support expanding operations and a diverse client base. The new system was introduced to centralise company processes, improve data visibility, and enable better-informed decision-making across engineering, management, and accounting functions.

The implementation process was marked by both notable successes and significant challenges. On the positive side, MM Engineering's leadership demonstrated strong commitment through strategic resource allocation and a phased rollout approach. Senior staff were extensively briefed and trained, which helped drive early operational gains. The transition to EPICOR resulted in measurable improvements, including a 28% increase in budget accuracy, more robust tracking of labour and material costs, and enhanced accountability through individual staff logins. The integration of Bills of Materials (BOMs) and centralised cost tracking further enabled precise project costing and reduced material waste.

However, the report also identifies areas for improvement. Notably, the limited involvement of non-senior staff during planning and training phases led to confusion, resistance, and errors in job logging and pricing. The complexity of EPICOR's workflows, particularly for routine tasks like invoice requisitions, created frustration and inefficiency, requiring additional hires in the accounting department. Post-implementation support was also found to be lacking, especially for frontline staff, resulting in ongoing challenges and partial regression to old habits.

To analyse the effectiveness of the change management process, the report applies Lewin's Force Field Analysis, revealing that the net restraining forces slightly outweighed the driving forces, with workflow complexity and lack of support being key barriers. Kotter's 8-Step Change Model is used to develop recommendations, including fostering a sense of urgency, building a broader coalition, simplifying workflows, and embedding new practices in the company culture. Maslow's Hierarchy of Needs is also applied to highlight the importance of addressing staff motivation at every level, from job security to opportunities for growth and recognition.

In conclusion, while the EPICOR implementation brought significant operational benefits, its long-term success depends on more inclusive engagement, ongoing support, and a continued focus on both technical and human factors. The lessons learned provide a clear roadmap for future improvements and sustainable change at MM Engineering.

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1. Introduction

MM Engineering, located in Port Talbot, South Wales, is a leading manufacturer of flood defence solutions for a diverse, global client base. As the company experienced rapid growth in both operations and customer numbers, it became clear that traditional management and bookkeeping methods were no longer sufficient to support its evolving needs. To address these challenges and drive greater operational efficiency, MM Engineering implemented EPICOR-a comprehensive MRP/ERP system designed to integrate engineering, management, and accounting functions into a single, unified platform.

The adoption of EPICOR was motivated by the need to centralise company operations, improve data visibility across departments, and enable better-informed decision-making. The implementation process itself required significant customisation of the software, close collaboration with EPICOR specialists, and extensive training for staff to ensure the system was tailored to MM Engineering's unique workflows. Despite these efforts, the transition was not without its difficulties. Employees faced a steep learning curve, and the complexity of the new software, combined with the time and resources needed for full adoption, presented ongoing challenges. Implementing an ERP system is a complex process that requires careful planning, industry expertise, and a clear understanding of business needs (SAP, 2020; Deloitte, 2024; Park University, 2025).

This report critically examines the management of EPICOR's implementation at MM Engineering, evaluating both the positive outcomes and areas where the process could be improved. The analysis employs Lewin's Force Field Analysis to identify the driving and restraining forces influencing the change and uses Kotter's 8-Step Change Model to develop recommendations for effective change management. Maslow's Hierarchy of Needs is also applied to explore how employee motivation and engagement can be enhanced throughout the change process. The report concludes by highlighting best practices, lessons learned, and opportunities for further improvement.

2. Main Findings

2.1 Effectiveness of Change Management Process

2.1.1 Strengths of the Approach

Strategic Resource Allocation

Majority of staff were attended several EPICOR workshops with agents to learn the software and optimise its capabilities. Senior members of staff (Managers and Directors) were briefed extensively on how to correctly and efficiently operate EPICOR which had a drip-down effect on non-senior staff. The result of this was a vast increase in operational efficiency such as accurate invoicing, correct time management, easily accessible parts library etc.

Risk Mitigation

A phased rollout of the system prevented disruptions before full launch due to the incorporation of a pilot team, teething errors were quickly spotted and rectified before full rollout after agents liaised closely with senior members of staff. Industry guidance recommends phased rollouts and pilot testing to minimize disruption and manage risk (Deloitte, 2024; SAP, 2020; Park University, 2025).

Operational Gains

EPICOR's centralized cost tracking significantly enhanced MM Engineering's budget accuracy, improving it by 28%. In contrast, during the period when EYE2EYE served as the primary MRP system, labour hours were only loosely monitored due to the system's limitations. EYE2EYE was primarily used by senior staff for part and receipt entries, as well as rough labour and cost estimates. EPICOR, however, offers a more robust and accountable approach—each staff member has individual login credentials and is responsible for entering their own labour hours, removing the reliance on estimations, and improving data accuracy.

EPICOR's data capabilities have significantly improved the tracking of both labour hours and material costs. Every part used by MME during production is now integrated into EPICOR's centralized database, with detailed cost information per item or per metre. This allows for more accurate cost calculations and helps minimize material waste. Parts and quantities from drawing BOMs (Bills of Materials) are assigned to each job, enabling production staff to use materials more precisely and efficiently. As a result, operational efficiency increases, and finance and sales teams gain access to accurate pricing data—empowering them to price jobs correctly, streamline cash flow, and optimize profit and loss.

2.1.2 Weaknesses of the Approach

Employee Exclusion

During EPICOR's implementation it was clear that, to work, it needed regular input from all employees across the company. Senior members of staff regularly attended workshops to adapt to the way EPICOR altered the way the company runs, but other staff were not briefed accordingly. So once EPICOR was rolled out, members of staff were inadequately trained leading to inaccuracies including, signing on to wrong jobs, mispricing products, missing purchase orders amongst others. Welders and fitters with limited technical knowledge struggled so had to be briefed more extensively than others, wasting their time and senior staff's time. Insufficient training and lack of inclusive communication are among the most common pitfalls in ERP projects (Forbes, 2025; Panorama Consulting, 2025; Odoo, 2025).

Workflow Complexity

The nature of the software made operation long-winded and difficult, simple tasks such as entering purchase orders were often over-complicated due to EPICOR's advanced features. The software's 7-step process for invoice requisitions (compared to EYE2EYE's 3) slowed down the accounting department to where 2 new staff were hired to combat the new inefficient way of accounting due to EPICOR. To this day accounting staff struggle with EPICOR's complicated finance structure and algorithms, a new senior accountant was recently appointed and has raised critical concerns with the workflow of the MRP's accounting capabilities.

2.2 Lewin's Force Field Analysis

Kurt Lewin's Force Field Analysis is a decision-making tool developed in the 1940s to aid in understanding the factors that influence change within organizations. According to Lewin, any situation is maintained by an equilibrium between two sets of opposing forces: driving forces that support change and restraining forces that hinder it. Change can only occur when the balance between these forces is altered—either by strengthening the driving forces or reducing the restraining forces (Burnes, 2017).

Driving Forces (Promoting Change)	Score	Restraining Forces	Score
Improved cost visibility for tidal barrier projects	+4	Employee resistance due to complex workflows	-4
Centralized data access across all the Company's teams	+3	Nostalgia for EYE2EYE's simplicity	-3
Enhanced audit compliance with Welsh Coastal Protection Act	+3	Multi-step material requisitions delaying urgent repairs	-4
Leadership commitment (£250k training budget)	+3	Inadequate post-launch support for non-senior staff	-3
Real-time flood monitoring integration	+2	Technical challenges with purchase order entries	-2
Total	+15	Total	-16

2.2.1 Critical Evaluation

Quasi Equilibrium State

The net force of -1 highlights ongoing resistance even after 12 months, especially during autumn when increased rainfall drives higher demand. The most significant restraining force (-4) was the complexity of EPICOR's workflows. Staff frequently cited lengthy processes for simple tasks and an overly complicated user interface and database structure, leading to widespread frustration and a surge in negative feedback. A robust post-implementation support plan is essential for long-term ERP adoption (NetSuite, 2025; Park University, 2025; SAP, 2020).

Unfreezing Phase Gaps

Limited staff involvement in software selection led to perception gaps between users and EPICOR's system. Leadership prioritized financial benefits (+4) but overlooked staff's cultural attachment to EYE2EYE (-3). Insufficient post-launch support (-2) widened the disconnect, making the rollout lengthy and complex. Staff with minimal technical expertise were expected to adapt quickly, despite

EYE2EYE requiring little prior learning. This was evident in the welding teams inability to correctly manage the time of their jobs, leading to inaccurate labour hours which can have severe financial implications if not addressed.

Refreezing Challenges

Refreezing is the final stage of Lewin's change model, where the new way of working (e.g., using EPICOR) is stabilized and becomes the accepted norm. The goal is to reinforce, embed, and solidify the changes to prevent employees from reverting to old habits (Malik, 2022). Across the organization, resistance to EPICOR grew due to its perceived complexity, with many staff members regressing to familiar workflows from the EYE2EYE system. If the organizational culture does not fully embrace the new processes, pockets of resistance can persist and undermine the change effort. Similarly, without consistent reinforcement, employees are more likely to fall back into old patterns (such as using EYE2EYE methods) when facing pressure or frustration with the new system. Ultimately, a lack of sufficient reinforcement was a major contributor to the ongoing challenges in adopting EPICOR.

2.3 Recommendations via Kotter's 8-Step Change Model

2.3.1 Create a Sense of Urgency

Highlight the risks of maintaining the status quo with EYE2EYE, such as inefficiencies, compliance risks with the UK's Environmental Agency, and financial losses due to poor cost tracking. Use audit data and real-life examples to demonstrate the necessity for change (Kotter, 1995; BusinessBalls, 2025). Kotter's framework has been successfully applied across industries to break down silos and drive transformation (LinkedIn, 2024; Burnes, 2017; Ultra Consultants, 2024).

2.3.2 Build a Guiding Coalition

Form a cross-functional team including senior management, respected engineers, and frontline staff. Ensure this coalition represents members of staff who both like and dislike the new system to get more people on board and address concerns about workflow complexity and post-launch support (Kotter, 1995; BusinessBalls, 2025).

2.3.3 Develop a Vision and Strategy

Craft a compelling vision such as: "EPICOR: One system for faster flood responses, clearer costs, and compliance." Set measurable goals, like reducing invoice requisition steps and improving audit compliance, to guide the transition (Kotter, 1995).

2.3.4 Communicate the Vision

Regularly communicate the vision and benefits of EPICOR through workshops, dashboards, and team meetings. Address staff concerns about complexity and nostalgia for EYE2EYE, and be transparent about the learning curve (Kotter, 1995).

2.3.5 Empower Broad-Based Action

Remove barriers by simplifying EPICOR workflows, providing targeted training, and establishing a dedicated helpdesk for ongoing support. Enable staff to suggest improvements and act on feedback, directly addressing restraining forces like workflow complexity and inadequate support (Kotter, 1995; Haaland, 2020).

2.3.6 Generate Short-Term Wins

Set achievable milestones (e.g., faster material requisition, reduced invoice errors) and celebrate these

publicly. Recognize and reward employees who adapt well to EPICOR, which helps reinforce positive change and reduce resistance (Kotter, 1995; BusinessBalls, 2025).

2.3.7 Sustain Acceleration

Build on early successes by continuously refining workflows and expanding training. Use feedback from short-term wins to address remaining technical challenges and further reduce resistance (Kotter, 1995).

2.3.8 Anchor New Approaches in Culture

Update standard operating procedures and job descriptions to formalize EPICOR as the new norm. Incorporate EPICOR proficiency into performance reviews and advancement criteria and share stories of successful use to reinforce the change (Kotter, 1995; Haaland, 2020).

2.3.9 How Each Step Addresses Lewin's Forces

- **Strengthens Driving Forces:** Steps 1–4 increase urgency, leadership support, and clarity, reinforcing the push for change.
- **Reduces Restraining Forces:** Steps 5–8 remove operational barriers, address resistance, and embed new practices, making regression less likely (Lewin, 1951; IfM, 2025).

2.4 Employee Motivation: Application of Maslow's Hierarchy of Needs

Maslow's Hierarchy of Needs provides a framework to address employee resistance and foster engagement during organizational change. By fulfilling employees' foundational needs, MM Engineering can improve motivation and ease the transition to EPICOR (Maslow, 1943; TSW, 2024).

2.4.1 Physiological Needs (Basic Stability)

- **Action:** Ensure job security and financial stability during the transition. Clearly communicate that EPICOR adoption aims to enhance efficiency, not reduce headcount.
- **Example:** Guarantee no layoffs for 12 months post-implementation to alleviate fears, do not prejudice staff for their ability to navigate the software or punish them for taking too long on a job, that will encourage incorrect use of the software otherwise. (Pluxee, 2025).

2.4.2 Safety Needs (Job Security & Comfort)

- **Action:** Provide structured training and ongoing IT support to reduce anxiety about EPICOR's complexity.
- **Example:** Create a "Safe Learning Zone" where employees practice EPICOR workflows without affecting live data (HRDQ, 2025).
- **Alignment:** Addresses the restraining force of frustration with multi-step workflows identified in Lewin's analysis.

2.4.3 Love/Belonging (Team Cohesion)

- **Action:** Foster collaboration through cross-departmental EPICOR user groups.
- **Example:** Create team meetings where all staff work through workflow problems to help broaden their knowledge and create team cohesion, strengthening peer connections (TSW, 2024).

2.4.4 Esteem Needs (Recognition & Achievement)

- **Action:** Publicly recognize employees who master EPICOR modules or suggest improvements. Modern motivation theories, such as Equity Theory and Reinforcement Theory, further

support the importance of fairness and recognition in change processes (MTD Training, 2025; Pluxee, 2025).

- Example: Award “EPICOR Innovator” badges and bonuses for streamlining floodgate repair workflows (Process Excellence Network, 2025).
- Impact: Counters nostalgia for EYE2EYE by building pride in new competencies.

2.4.5 Self-Actualization (Growth Opportunities)

- Action: Offer advanced EPICOR certifications and leadership roles in system optimization.
- Example: Enable senior engineers to customize EPICOR dashboards for project analytics, aligning with their expertise (Pluxee, 2025).

2.4.6 Theoretical Alignment

- Lewin’s Model: Fulfilling safety/esteem needs reduces resistance (-4 score), while self-actualization opportunities strengthen driving forces like leadership support (+3 → +4).
- Kotter’s Steps: Esteem recognition supports Step 6 (short-term wins), while team-building activities reinforce Step 4 (communicate vision).

3. Good Practice vs. Improvement Opportunities (300-400 words)

The implementation of EPICOR at MM Engineering demonstrates several elements of good practice, but also reveals clear opportunities for improvement that are common in ERP projects across the engineering sector. ERP best practices include comprehensive documentation, strong data governance, and continuous feedback loops (SAP, 2020; Deloitte, 2024; Park University, 2025).

3.1 Good Practice

One of the most notable strengths was the strategic allocation of resources and phased rollout approach. Senior management's commitment to training, including workshops with EPICOR agents and comprehensive briefings for leadership, ensured that key decision-makers understood the system's capabilities and could cascade knowledge to their teams. This top-down approach contributed to significant operational gains, such as a 28% improvement in budget accuracy and enhanced tracking of labour and material costs. The use of individual logins for staff increased accountability and data accuracy, while EPICOR's integration of Bills of Materials (BOMs) and centralized cost tracking enabled more precise project costing and reduced material waste. These practices align with industry recommendations to focus on business process improvement and leverage ERP features for efficiency and profitability (DCKAP, 2024; Rsult, 2024; Inixion, 2025).

Additionally, the phased rollout and pilot testing allowed MM Engineering to identify and address initial "teething errors" before full deployment, minimizing disruption and supporting a smoother transition. This reflects ERP best practices, which emphasize thorough planning, gap analysis, and staged implementation to reduce risk (Netsuite, 2025).

3.2 Improvement Opportunities

Despite these strengths, there were areas where the implementation process could be enhanced. A major weakness was the limited involvement of non-senior staff in both the planning and training phases. While senior staff received extensive support, many frontline employees were not adequately briefed or trained, leading to confusion, errors in job logging, and mispricing. This lack of broad engagement contributed to resistance and a slower learning curve, highlighting the importance of inclusive communication and comprehensive training for all users (Epicforce Tech, 2024; Inixion, 2025).

Workflow complexity also emerged as a significant barrier. EPICOR's multi-step processes, particularly for tasks like invoice requisitions, were perceived as cumbersome compared to the previous EYE2EYE system. This complexity led to inefficiencies and even required additional hires in the accounting department, including a head of finance and an apprentice to tidy up missing Purchase orders. Industry best practices recommend customizing ERP workflows to fit organizational needs, simplifying user interfaces, and providing ongoing support to address such challenges (DCKAP, 2024; Rsult, 2024).

Finally, post-implementation support was insufficient for non-senior staff, resulting in ongoing frustration and partial regression to old habits. Continuous support, regular feedback sessions, and iterative process improvements are essential to reinforce new systems and prevent backsliding (Netsuite, 2025; Inixion, 2025).

4. Conclusion

The implementation of EPICOR at MM Engineering marked a significant turning point for the company, addressing the pressing need for greater operational efficiency and more accurate data management as the business continued to grow. While the transition brought about clear improvements-such as enhanced cost tracking, better resource allocation, and increased accountability through individual logins-it also surfaced several challenges that have shaped the company's learning journey.

One of the main successes of the project was the strong leadership shown during the planning and rollout phases, as well as the commitment to training and phased deployment. These steps helped minimise disruption and allowed the company to quickly realise some of the benefits of the new system (DCKAP, 2024; Inixion, 2025). However, the process also highlighted areas where MM Engineering can improve. In particular, the limited involvement of non-senior staff in both planning and training led to confusion and resistance, while the complexity of EPICOR's workflows created frustration and inefficiencies for many employees (Epicforce Tech, 2024).

The analysis using Lewin's Force Field Model and Kotter's 8-Step Change Model demonstrates that successful change requires not just technical solutions, but also strong communication, inclusive engagement, and ongoing support (Kotter, 1995; Lewin, 1951). Applying Maslow's Hierarchy of Needs further shows that supporting staff at every level-from basic job security to opportunities for growth-is essential for lasting change (Maslow, 1943).

Looking forward, MM Engineering's experience with EPICOR offers valuable lessons: prioritise inclusive training, simplify workflows where possible, and maintain open channels for feedback. By doing so, the company will be better placed to embed new systems and continue its growth with confidence. MM Engineering's strong stance as the market leader in flood defence is accredited to the accuracy of EPICOR but is held back in certain areas which are more internal issues than anything else. The company will continue in its journey with EPICOR as its ERP system, hopefully growing alongside it.

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