

# ERP Selection Success Roadmap

Your 8 step guide to  
successfully navigating the  
ERP selection process



Need help getting started?

**Contact us today!**

We're here to get you on the right track.

# Hi and welcome to your ERP Selection Success Roadmap!

Over the last 25+ years, we've implemented over 200 ERP projects, especially in the spaces of Manufacturing, Aged and Home Care and Distribution.

During this time, we've been involved in just as many ERP selection processes that are wide and varied in their approach, from those organisations who choose to run the process internally to those who have engaged in independent ERP selection consultants to run the process for them.

Whichever way you choose, we have found that these 8 steps are essential for a successful ERP implementation.

This roadmap is the distillation of our 25 years of experience and **highlight some key steps that are often overlooked**, early in the selection process. These steps are the preparation you need to set you up for success and if skipped, could potentially **cost you hundreds of thousands of dollars** in implementation and opportunity costs.

We are looking forward to sharing the steps with you!

Best regards,



Mark Batina  
Managing Director

**P.S.** If you are thinking about what's next for your ERP system and would like some friendly (FREE) advice to help you get started, let's catch up for a chat! You can book some time in my calendar via this link or click on the button below.



[Book a time to chat with Mark](#)



# ERP Selection Success Roadmap

8 steps to successfully navigate the ERP selection process

1

## Understand the Problem

Identify the root cause of your business problems by engaging in a deep dive into system constraints and cost drivers as well as compliance and governance considerations.



2

## Justify the Project

Quantify the cost of the problems, start to create an initial set of requirements and build a business case to justify the change.



3

## Scan the Market

Look for solutions that are a proven fit for your industry, match initial requirements to market offerings and create a shortlist of potential vendors.



4

## Document the Requirements

Document your requirements for each functional area of your business in a clear and concise way, including describing the long term vision of the project and priorities.



5

## Engage with Shortlisted Vendors

Invite shortlisted vendors to participate in the process. Distribute requirements to the vendors and meet to discuss initial project parameters.

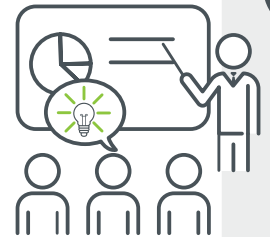


6

## Evaluate Vendors

Conduct discovery meetings to help the vendors prepare for the initial demonstration.

Evaluate outcomes of the demonstrations and shortlist down to two or three vendors.



7

## Select Preferred Vendor

Prepare for final demonstrations. Create detailed business process scenarios and assess demonstration outcomes. Request formal proposals and pricing from vendors and select preferred vendor.



8

## Conduct Project Discovery

Engage in a project scoping process with the preferred vendor to translate requirements and processes into solution design.

Create a statement of work and finalise proposal, pricing and commercial terms.



1



## Understand the Problem

Identify the root cause of your business problems by engaging in a deep dive into system constraints and cost drivers as well as compliance and governance considerations.

- Problem deep dive into system constraints and cost drivers.
- Considerations for compliance and governance.
- How big is the problem? What is driving the need for change?
- Initiate a root cause analysis to understand the problem.
- Engage key stakeholders.

2



## Justify the Project

Quantify the cost of the problems, start to create an initial set of requirements and build a business case to justify the change.

- Understand your workflows and processes by undertaking business process mapping for key functions.
- Define initial problem statement and requirements.
- Quantify the cost of the problems, both tangible and intangible.
- Understand the value that can be realised by addressing the real problems.
- Build a business case.
- Validate outcomes to key stakeholders and gain approval to continue with a selection process.

3



## Scan the Market

Look for solutions that are a proven fit for your industry, match initial requirements to market offerings and create a shortlist of potential vendors.

- Build your awareness to stay in control of the process.
- Research options on the internet, look at product comparison and evaluation websites, talk to colleagues in the same industry, ask questions on forums and LinkedIn groups.
- Watch online demonstrations and YouTube videos
- Look for solutions that are a proven fit for your industry.
- Match initial requirements back to market offerings.
- Create a shortlist of potential vendors, including vendor partners.

4



## Document the Requirements

Document your requirements for each functional area of your business in a clear and concise way, including describing the long term vision of the project and priorities.

- Update requirements based on market scan.
- Engage and validate with key stakeholders.
- Understand what the business is able to undertake over what period of time based on available resources and the current level of 'ERP Maturity' within the business.
- Calculate how many users are required to access each function within the system.
- Create a statement of requirements, including describing the long term vision of the project and what needs to be addressed first.

5

## Engage with Shortlisted Vendors

Invite shortlisted vendors to participate in the process.

Distribute requirements to the vendors and meet to discuss initial project parameters.



- Invite shortlisted vendors to participate in the process.
- Distribute statement of requirements to participating vendors.
- Meet with each shortlisted vendor to validate inclusion and discuss initial project parameters.
- Invite selected vendors to participate in initial demonstration.
- Commence planning for Change Management within the business.

6

## Evaluate Vendors

Conduct discovery meetings to help the vendors prepare for the initial demonstration.

Evaluate outcomes of the demonstrations and shortlist down to two or three vendors.



- Pre-demonstration discovery meeting to help the vendors formulate the demonstration based on the requirements and discussions with key stakeholders.
- Participate in initial demonstrations with all shortlisted vendors.
- Evaluate on functionality versus requirements, implementation partner, software vendor, ongoing support, geography (ie local or remote implementation team), technology, product maturity, product roadmap.
- Shortlist down to two or three vendors based on activities so far.

7

## Select Preferred Vendor

Prepare for final demonstrations. Create detailed business process scenarios and assess demonstration outcomes. Request formal proposals and pricing from vendors and select preferred vendor.



- Request formal response to requirements and a proposal based on interactions to date.
- Collate vendor responses and proposals with estimated software and services.
- Define detailed demonstration scripts/business process scenarios.
- Validate demonstration scripts with key stakeholders and distribute to shortlisted vendors.
- Participate in detailed demonstrations with key stakeholders.
- Assess demonstration outcomes and seek clarification where needed.
- Request formal proposal with refined pricing from vendors.
- Select and notify preferred vendor.

8

## Conduct Project Discovery

Engage in a project scoping process with the preferred vendor to translate requirements and processes into solution design.

Create a statement of work and finalise proposal, pricing and commercial terms.



- Agree commercial terms with the preferred vendor for the project scoping process.
- Vendor will facilitate a series of workshops to translate requirements and processes into solution design and identify any gaps that may need addressing.
- Vendor will transfer the project deliverables onto a timeline.
- Vendor will create a statement of work to define the scope.
- Vendor provides final proposal including commercial agreements (software, services and commercial terms).