

CHAPTER 3

SELECTING YOUR SOFTWARE PARTNER/VENDOR AND SOFTWARE APPLICATION.
KEEPING THE RELATIONSHIP IN HEAVEN, NOT THE OTHER PLACE.

LESSON #1

Make sure someone else was the **guinea pig**. Get a tried and tested ERP solution installed in companies with requirements similar to yours.

Key criteria for software include:



TECHNICAL / ARCHITECTURE CRITERIA:

- What database is required to run the ERP solution?
- Is the database mainstream and globally supported?
- Is the solution scalable?

- Can third party applications be integrated to the application?
- What add-on solutions are available?
- Can user defined fields and tables be easily added to the solution?

- Can the system be customised and if so what programming frameworks and languages can be used?

- Is Cloud an option?
- How is remote access achieved?



FUNCTIONAL REQUIREMENTS:

Functional requirements are usually specific to each company's requirements - some examples include:

- Does the solution include multiwarehouse functionality?
- Is Customer Relationship Management integrated to the rest of the ERP solution?
- Is recurring invoicing available?



REPORTING

- Which reporting applications are integrated?
- How easy are the table and field names to understand?
- What standard reports are available?
- Is ODBC integration to MS Excel Pivot Tables available?



DATA CONVERSION

- How much data will be converted?
- Will only master data be converted?
- What format will data need to be presented in for data import?

LESSON #2

Vet the company, code, and implementation team. A checklist for assuring a successful consulting relationship.

Main criteria for choosing an implementation company and team include:



Length of time in business. Seek a minimum of 5 years.



Rating with their software suppliers.



Evaluate their training, support, project management and problem resolution capabilities.

"Is the solution provider local?"



Have they installed systems in similar organisations with requirements that closely match yours?



Are they a top tier provider for the software solutions they work with? Top tier solution providers tend get access to better resources, faster problem solving and better support from the vendor.



How experienced are the lead consultants, management of the implementation partner and project managers? The longer an implementation partner has been implementing the same line of software, the more secure they are with implementing it.



How deep is their technical bench? Do they have several programmers, technical and applications consultants that can handle this project, and how much experience do they have?



Can the solutions provider offer a turn-key installation or will they have to call in multiple subcontractors? While hiring sub-contractors is not always inadvisable, it is better for clients if a consultant has the resources to keep everything in house.

LESSON #3

Critical factors for each stage: committee creation, evaluation process, defining the statement of work, project plan, scope, and deliverables with a timeline.



Set a time limit for the committee to reach a decision. 3 months or less is reasonable for a small to medium business. More time will be required for a larger corporate.



Include all departments in the committee, and designate back up people for each department. This avoids delays when a department person is not available.



Create a decision matrix that each committee member fills out with their concerns, and a point rating system. By doing this, a decision can be quickly reached by numbers, as opposed to debating it without knowing the real criteria.