



Software Selection Service

Choosing a package to meet your expectations.

Once implemented an ERP system becomes embedded in operations making drastic changes or replacement costly, time consuming and disruptive. Selecting and implementing the right ERP system is a complex decision whose outcome is driven by a variety of factors including, among others; total cost of ownership, time to implement, best-of-breed, best-practices, time-to-ROI and more. However, when nearly every software vendor claims that its products deliver best-practices—how do you choose which package is the best-fit for your organization?

Drawing from our experience with a wide variety of leading software packages designed for mid-market and enterprise-level organizations, BTRG consultants guide you through the selection process using a structured yet flexible analysis process. Partnering with experienced consultants will help your organization to select the right software upfront so it can avoid expensive downstream costs associated with integration, regulatory change, and the pressures of adapting to growth or changes in strategic direction.

Getting Started

The first step towards selecting the right software vendor and package begins with a kick off meeting. Every organization's goals and objects are unique. Identifying the software package that will meet your needs and expectations begins by developing a clear understanding your strategic objectives.

The next step is to take the strategic objectives document and use it as a springboard to defining the requirements. This involves an analysis of the business processes critical to your organization's success. For instance, if you're a manufacturer the contracts-to-cash business process is critical, whereas if you're a healthcare provider that also acts as an educational institution then managing the pre-to-post awards process for grants may be most critical.



Requirements Definition

We'll then define and document your organization's functional requirements which we'll gather through a series of iterative interviews with internal process owners. In doing so, we'll also uncover and draw attention to opportunities to reengineer key business processes.

Understanding which processes are critical to driving your organization's strategic objectives will enable us to narrow the field of prospective vendors to those offering best-of-breed solutions. We'll then analyze these best-of-breed solutions to either ensure a fit within your current IT infrastructure—or recommend why and how your infrastructure needs to change.

Week 1: Strategy and Approach

- ◆ Planning Discussion and Kick-Off
- ◆ Executive Team Interviews
- ◆ Cultivate Understanding of Corporate Strategy
- ◆ Document Strategic Objectives and Approach
- ◆ Review timetable, project steps, roles and scope
- ◆ Assign owners for requirements development

Weeks 2 and 3: Requirements Definition

- ◆ Interview Process Owners
- ◆ Identify Opportunities to Reengineer
- ◆ Determine, Document and Agree to Functionality
- ◆ Organize Requirements
- ◆ Weight and Prioritize Requirements
- ◆ Identify Gaps

*the Business & Technology Resource Group, Inc.
Bridging Business and Technology*

For more information contact us at 877-287-4462 or sales@btrgroup.com



Analysis and Vendor RFP

No ERP package can fully meet every need or expectation or an organizations, because every company runs its business with different strategies and goals. Therefore, the objective of a software selection analysis is to increase the chances of successfully choosing the software that most closely suits management’s requirements. A clear understanding of the requirement functionality—based on an assessment of the processes critical to achieving your strategy is the best means of pre-determining a successful choice. The next step is to author a request for proposal (RFP).

As an implementer of ERP systems for 15 years we have responded to countless RFP’s. Our experience with both developing and responding to RFP’s—combined with our deep understanding of the functional requirements of your organization—positions us as an excellent choice to lead or support RFP development for your software selection process . Our expertise will help you identify and draw out the key areas where detailed explanations from the chosen vendors are warranted and desired. When completed, we’ll solicit and manage the vendor questions and responses—including you in every step.

Response Review and Vendor Demonstrations

When the vendor responses have been received, we’ll evaluate each proposal with your staff. Each proposal will be scored and weighted according to key criteria determined during the initial stages of strategy and requirement documentation. We finalize the results and organize product demos with any of the vendors who have met the baseline criteria for potential acceptance.

Throughout the vendor demonstrations, we’ll pull in key functional analysts who have expertise with the software under consideration. They’ll score and evaluate the software based on the requirements document. You’ll be more confident during the vendor demonstrations because our experts will be onsite to ask the tough questions only deep functional experience can expose.

Selection and Presentation

After the demonstration has been completed, we’ll organize our findings, review them with your team and then make our formal recommendations to your senior management team, board of directors, or primary group of key stakeholders. Our presentation will provide a full, detailed business case including a comparative analysis of the total cost of ownership, features fit, vendor stability, and future product direction. Plan to spend about 12 weeks to complete the software selection process from start to finish. For more information contact us at 877-287-4462 or sales@btrgroup.com. You may also visit us online at

Weeks 4-7: RFP Development and Response

- ◆ Identify Capable Vendors
- ◆ Develop RFP
- ◆ Solicit and Manage RFP Response
- ◆ Facilitate Vendor Questions to the Team
- ◆ Clarify and Interpret Q&A Responses

Weeks 8-9: Response Review and Evaluation

- ◆ Evaluate and Score Responses
- ◆ Finalize Demonstration Scripts
- ◆ Organize Onsite Demonstrations

Week 10: Vendor Demonstrations

- ◆ Score and Evaluate Demonstrations

Week 11: Software Selection

- ◆ Evaluate Scoring, Features
- ◆ Determine and Document Total Cost of Ownership
- ◆ Check Peer Group References
- ◆ Finalize Software Selection Business Case

Week 12: Present Findings and Recommendations

- ◆ Present to Management Team or Board of Directors

*Business & Technology Resource Group, Inc.
Bridging Business and Technology*

For more information contact us at 877-287-4462 or sales@btrgroup.com