



The SME Guide to Selecting ERP

How to Navigate Your ERP Project with Ease

Introduction

What's inside?

- ▶ Understanding ERP basics
- ▶ When to make the move to ERP
- ▶ How to evaluate ERP solutions
- ▶ Select the right ERP and partner

In the past, full-fledged ERP (Enterprise Resource Planning) functionality was beyond the reach of small to mid-size businesses. Today, advanced capabilities that were once the domain of big business are now entirely feasible and can make a significant difference to your bottom line. For growing businesses, remaining relevant in an increasingly competitive market is crucial to success, making a comprehensive ERP system a necessity, rather than an option.

If you're drowning in paperwork and fragmented information from disparate systems, you might be ready to implement an ERP system. But understanding the software choices, narrowing down the options and selecting a new system can be overwhelming.

We're here to help. This guide is designed to make your ERP selection process a little less daunting. We'll walk you through the process, right from initial research to final decision. You'll find answers to common questions, tips on how to structure your evaluation, and guidance on how to assess not only the software, but also the partners you'll work with.

Want some one-on-one help with your search?

[Get in touch with us >](#)

We'll setup an intro call to get to know your business, the key pains with your current systems and what you're hoping to achieve with a new ERP. If there's a good fit, we'll move into a discovery session to dig deep into your business processes. And if we don't feel we have the best solution, we can provide recommended next steps to help with your search.

Understanding ERP basics

What is ERP?

Think about all the processes that are essential to running your business – accounting, sales, inventory management, purchasing, production, service, etc. The list goes on based on your business structure.

Enterprise Resource Planning (ERP) software integrates all the core functions across your business into one system.



There are many options for business management software, but not all software is created equal. So, what sets ERP apart?

- ▶ ERP software has a **shared database** that supports multiple functions used by different business units.
- ▶ ERP enables **company-wide integration** with data from all departments in one system.
- ▶ ERP **automates processes** allowing you to operate in real-time and make faster, more informed decisions.
- ▶ ERP software provides **synchronized business reporting**, pulling data from a single system.

Is it time to move on from accounting software?

- ✔ You need more than basic accounting functionality.
- ✔ You have a mess of systems to manage the business.
- ✔ Your processes are manual and time-consuming.
- ✔ You can't answer key questions about your business.

What's the difference between ERP and accounting software?

Let's consider the most popular accounting software for SMEs – QuickBooks. It's simple, easy to use and doesn't require any significant knowledge of accounting. With functionality to create invoices, track cash flow, accept payments, manage bills, send estimates and perform basic financial reporting, it handles most accounting requirements.

But if you have multiple subsidiaries or foreign currencies, you'll understand the frustration of financial consolidation. It's manual and time-consuming. The same can be said for revenue recognition. And functionality for recurring billing and fixed asset management is simply non-existent.

These are common challenges with QuickBooks and the like – and that just covers your accounting needs.

What about the rest of your business outside of finance?

You're likely using separate systems and tools to manage all other areas of the business. It's often a combination of spreadsheets, point solutions and homegrown systems you've built up over time. They're all distinct and likely don't talk to each other all that well, if at all.

Achieving visibility in your business will be a challenge, simply because your data is disjointed. Not to mention the inefficiency that comes with duplicate data entry and manual processes.

ERP solves these challenges by pulling your entire business into one system.

↑ 10%
increase
in revenue
performance

Source: NetSuite

↓ 36%
decrease in time
it takes to make
decisions

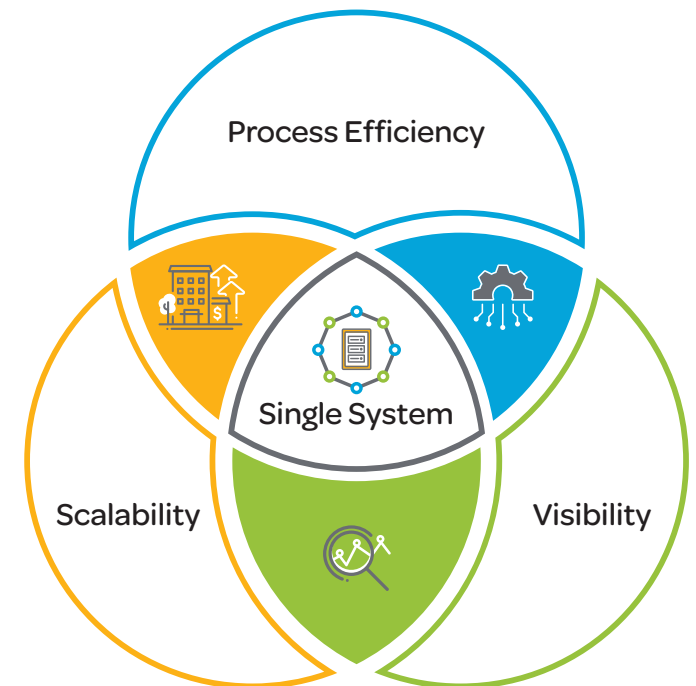
↓ 11%
reduction in
operational costs

Source: Aberdeen Group

What are the benefits of ERP?

ERP software offers many benefits to small and mid-size businesses – the list could go on and on. But in our experience, the benefits can be summed up into three categories. The specifics will vary from one company to another, but these are the common benefits that virtually all businesses experience.











The interesting thing to note is that these benefits rarely (if ever) present independently. They're all related to one another, so the impact is cumulative. As you work out the kinks in your processes, you naturally have better visibility into what's working and what's not. Both of these benefits position you to more easily scale your business. And what's at the core of it all? That single system (your ERP solution).



Ready to join top performers?

The **top 20%** of growing businesses have implemented ERP.

In a nutshell, ERP software streamlines your business processes and makes it easier for your employees to do their jobs. Here's how the benefits show up.

-  **Boost efficiency** by automating everyday tasks, freeing up your team to focus on higher value work.
-  Gain **real-time visibility** with powerful reporting that helps you make confident, data-driven decisions.
-  **Improve cash flow** with better visibility and tighter spending controls.
-  Get **more reliable data** with fewer manual processes and re-entry.
-  Deliver a **top-notch customer experience** with better information and faster response times.
-  **Lower IT costs** with a cloud-based tech stack that offloads infrastructure and maintenance from your internal team.
-  **Reduce operational costs** with more efficient processes and reduced labour costs.
-  **Speed up invoicing** and payment collection.
-  **Optimize your inventory mix** and make smarter purchasing decisions.
-  Create a **platform to scale** your business and adapt to market changes.



What's the difference between an ERP vendor and an ERP partner?

When you select an ERP software, you're selecting the vendor by default. But in many cases, you'll also choose an ERP partner to work with. You should give as much attention to **evaluating the vendor's reputation** as you do the software itself.

The ERP Vendor and Partner Relationship



What's the role of the ERP vendor?

The **ERP vendor** develops, publishes and maintains your ERP software. They're responsible for ongoing product development and support. In some cases, they'll also sell direct to customers.

What's the role of the ERP partner?

The ERP partner sells, implements and supports the software. While it might seem wise to buy direct through a vendor, ERP partners often have a deeper understanding of business process. They also offer more expertise with customization and integration if you need it. In short, a partner will be more relationship focused, which benefits you in the long run.

What types of ERP systems are there? Which is best for your business?

Explore the
off-the-shelf
ERP leaders...

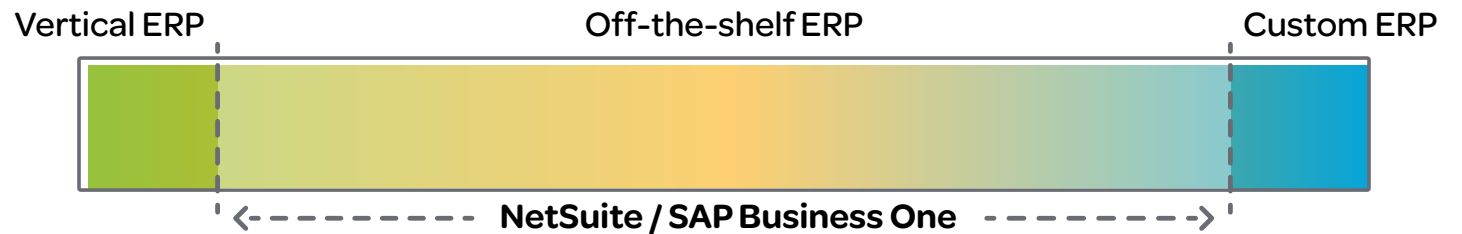
ORACLE
NETSUITE

SAP Business
One®

As you start searching for ERP software, you'll find there are many options. In addition to the different ERP vendors, there are also different **types of ERP systems**. Determining the type of ERP you want is the first box to tick on your requirements checklist.

Remember that you're not just choosing a system for what you need right now. Also consider what you'll need to support your business 10 years from now.

For most growing companies, an off-the-shelf ERP solution offers the best of all three options. Out-of-the-box features offer big results, but you still have the flexibility to add industry-specific applications to the mix and customize as necessary.



Buying ERP through a partner is a **recommended best practice**.

Your partner becomes an extension of your team – invested in your success the same way you are.

1. **Off-the-shelf ERP solutions** come with a built-in feature set that includes your basic ERP functionality, and often some more advanced capability.

This is the option many companies choose, as they offer strong out-of-the-box functionality plus the flexibility to tailor and customize. These tend to be stable, cost-effective products with established support channels.

Keep in mind that you may have to change some of your processes to fit the product, but that's not necessarily a bad thing. Today's ERP solutions are designed around best practices. Be open to adopting these models where it makes sense – it can change your processes for the better.

2. **Vertical ERP solutions** are developed for and used solely by companies in your industry.

You'll often get functionality specific to your industry and a deeper knowledge of the industry best practices. But they typically won't have as much flexibility to adapt to unique requirements or changing needs.

3. **Custom-built ERP solutions** come on a bit of a sliding scale. A truly custom-built solution is designed from the ground up based on your needs. The other option is to take a base ERP product and customize it to fit your unique business needs, workflows and processes.

As a general rule, the more customization, the bigger the price tag. But you'll have an ERP solution that's truly best fit for your business.

Which is better – on-premise or cloud?

An **on-premise ERP solution** is installed and maintained on a local server, within the walls of your building. Your users access the system as a desktop application on your local network.

While cloud ERP is gaining ground, on-premise solutions still have a place to meet specific requirements.

- ▶ An on-premise solution gives you full control over data security and disaster recovery measures, if you want it. You'll need a strong IT team to support this approach.
- ▶ On-premise ERP might be a more cost-effective option to meet high standards, contractual obligations or government legislation for data management.
- ▶ If you're in a remote location with unreliable internet service, on-premise might make sense. But you also restrict access to your system for remote employees.

By comparison, a **cloud ERP solution** (either public or private) is hosted in a cloud environment, giving you access to your system via an internet connection.

The way that companies work today, cloud ERP is the top choice for most. It's simply a more accessible option for growing businesses.

- ▶ Cloud ERP gives you easy access to your system from any location – all you need is an internet connection.
- ▶ Whether you choose public or private cloud, you'll get a level of data security, redundancy and uptime that's tough to achieve on your own.
- ▶ You can offload the heavy IT infrastructure investment and maintenance requirements from your internal IT team.

Cloud ERP gives you peace of mind that your data is replicated, backed up and available whenever you need it.

What's the difference between public, private and hybrid cloud ERP?

You'll hear a lot of talk about 'true cloud', as though the other options are imposters. That's simply not true. There are different approaches

to cloud ERP and each of them has a place. It all comes down to your requirements. Here's what you need to know.

Public cloud ERP

What most people think of when they hear 'cloud' is public cloud, where a third party provides application hosting, storage and other resources to users through a web browser.

Public cloud is a multi-tenant model, where the infrastructure is shared by many businesses. You don't own your ERP software and your data is stored in a public cloud, available to you for a monthly fee.

Things to consider:

- ▶ You can scale up capacity during peak times leveraging shared computing resources.
- ▶ The ERP vendor handles all system maintenance and infrastructure.
- ▶ The up-front cost is lower as you're not buying perpetual licenses or hardware.
- ▶ You'll always be on the latest version with automatic upgrades.
- ▶ If a corruption event occurs, it can affect all users sharing the same database.

Want the control
of on-premise
without the IT
overhead?

Private cloud ERP
gives you the best
of both worlds.

Private cloud ERP

Private cloud solutions also offer application hosting, storage and resources to users via the internet, but the technical environment is dedicated to a single organization.

Your users access the system through a remote app with the addition of a virtual private network (VPN) for added security if required. You have the option to purchase a license for each user so you own your software, or operate on a subscription basis as you would with public cloud.

Things to consider:

- ▶ You get agility, scalability and efficiency that's comparable to public cloud.
- ▶ Your data is secure in an environment dedicated to your company, with lower chances of a data corruption event.
- ▶ You can upgrade on your own timeline.
- ▶ The hosting provider (often your ERP partner) handles all maintenance and infrastructure.
- ▶ Accessing your ERP system through a VPN can be a drawback for some users (like a mobile sales team). Most solutions have mobile apps designed for these use cases.

By 2020, 90% of organizations will use a hybrid IT approach.

Hybrid cloud ERP

Hybrid cloud is precisely what the name suggests – a combination of public and private cloud, and in some cases, on-premise components.

This allows you to leverage functionality in both a desktop and web environment, all while keeping functionality and associated data where it's best suited.

Which cloud ERP option is right for your business?

Grab your copy of our guide for a simple set of questions to help you make the right choice.

Things to consider:

- ▶ Hybrid cloud offers the flexibility to adapt the delivery model of your ERP system based on user needs.
- ▶ You get the easy access and cost-effectiveness of public cloud.
- ▶ For mission critical data, you can ramp up security controls with private cloud.



Rule of Thumb...

Plan to spend
1% to 2% of
annual revenue
for a software and
services project.

How much does ERP cost?

ERP is a big investment. Naturally, cost is a top concern. It's also a tough question to answer as there can be a wide range based on your company size, number of users and functional requirements.

While we can't give you a ballpark number here, we can give you a breakdown of the factors that impact the **cost of your ERP system**.

Software licenses

License fees will vary based on the number of users, type of license and the licensing model.

- ▶ **Perpetual licenses** are typically used with on-premise systems. Once you purchase a license, you own it forever. You'll also pay an annual maintenance fee for each license.
- ▶ **Subscription licenses** are used with cloud ERP solutions. You pay a monthly fee for each user, based on the modules you use. You have flexibility to add or remove users as required.

Ask yourself...

Can we improve overall performance by 1% or 2%?

If yes, the cost of your implementation is paid for.

Implementation costs

The implementation is often where we see the greatest cost variation as the scope can vary based on your requirements. You typically have two implementation approaches to choose from that will impact cost.

- 1. Fixed price implementations** use a template model based on best practices in your industry. This method keeps costs down, but still gives you flexibility to tailor your system based on specific needs. Often the tailoring or customization is done in phases to get you up and running with critical functionality faster.
- 2. Time and materials implementations** are scoped and priced based on your specific requirements right from the start. Scope creep is the biggest risk here, but a good ERP partner can help you manage that with a phased approach and a solid project plan.

Customization and integration

If you have unique processes that can't be met out-of-the-box or need integrations with other systems, this will impact the price of your implementation.

The cost impact ranges based on your needs. But keep in mind that the cost is relative to the benefits you'll see in the business.

Ongoing costs

Implementing ERP isn't a 'set it and forget it' event. You'll have ongoing costs for training, implementation of new functionality and support through your partner. If you choose an on-premise or private cloud solution, you can also count on costs for upgrades, infrastructure maintenance (on-premise only) or hosting fees (for private cloud).

When to make the move to ERP

Are you big enough to use ERP?

In the past, full-fledged ERP functionality was beyond the reach of the small to mid-size business. But in recent years, ERP has become increasingly affordable with advanced capabilities that can make a big difference to your bottom line.

If your company is in that \$10 to \$50 million revenue range (or more), you're a perfect candidate for ERP. This is typically the size where you're seeing the need for increased efficiency and greater visibility to help you scale.

Your business is less than \$10 million...does that mean you're too small to need ERP?

Absolutely not. Even small companies with relatively simple processes will feel the weight of disjointed systems. If your productivity is down, you don't have visibility into performance or you're just struggling to manage the mess of systems you use, it's time to consider ERP.

Even at \$3 million in revenue, an ERP system could have significant impact. Size is only part of the equation.

We've created a readiness assessment to help you determine if you're ready for ERP.

[Take assessment >](#)







How do you know if you need ERP?

Take a minute and count how many separate systems you use across your business. What's your number? 10? 20? 50?

You might think those numbers seem high, but when you consider the tools used by every team in your organization, they add up quickly.

-  You can't answer key questions about your business performance.
-  Reporting requires manually compiling data from multiple sources.
-  Your processes are highly manual across the entire business.
-  You're constantly importing and exporting data between systems.
-  Onboarding new employees is painful – there's so many systems to learn and your processes are complicated.

Disparate systems are often the root cause of the pain you're experiencing. But here are some of the tell-tale signs that you need to consider implementing ERP.

-  Most of the business is run on spreadsheets.
-  Your sales and service teams don't have visibility into customer account status.
-  You're making important business decisions based on your gut.
-  Your team complains about inefficiency.
-  Finding information takes too much time.
-  You don't trust your data.

The average lifespan of an ERP system is 7 to 10 years.

Working closely with your ERP partner can help you extend the life of your ERP. **Continuous improvement** is the key.





You already have an ERP system – when should you upgrade to a new one?

Few businesses remain the same year after year. Operating procedures change, staff change, and new lines of business are added. The changes are endless.

The big draw of ERP software is that it grows with your business. You can often accommodate changes in your business by implementing new functionality in your existing ERP. Or sometimes a simple change in your process will do the trick.

But, there does come a time when replacing your system is the best option. As you consider new solutions, look at the big picture. Where is your business headed? What will you need to scale up effectively? To adapt to growing competition? For staff to remain efficient?

Here's how you'll know it's time.

-  Your current ERP system is unsupported or will be sunset in the next couple years.
-  You need new functionality to support changes in your business.
-  You're implementing workarounds for key processes in the business.
-  Your legacy ERP can't support your future growth.





Between **67% and 75%** of problems in business transformation projects center around people.

Make sure your team is ready and support them throughout your ERP project!

Is your team ready for an ERP project?




Identifying a business need for an ERP system is one piece of the puzzle. But if your team isn't ready to embrace the change, you're more likely to have a failed project.

For instance, if your executives aren't convinced you need ERP, they likely won't be supportive if issues arise during selection or implementation. Similarly, if key user groups aren't willing to accept process changes, their use of the new system will be limited, deeming the implementation a failure.

-  Have you had significant turmoil in the past few years? Are you still recovering? (e.g. leadership change, layoffs, IT projects)
-  Is your culture open to the project?
-  How will you convince holdouts of the value?
-  Have you identified your motivation for implementing ERP?

That's why we recommend doing a second readiness assessment that's focused on your culture and people. This is arguably one of the most important steps in your selection and it has a big impact on the success (or failure) of your project.

Start by **conducting a survey** to understand whether your company is ready to take on such a big project. We've put together a short list of questions to guide your conversation.






-  Does the ERP implementation have executive sponsorship? If yes, who?
-  Do you see any challenges or roadblocks to getting users on board? How will you overcome these?
-  Is your ERP project fully funded, including miscellaneous and unexpected expenses?

How to evaluate ERP solutions

Create your cross-functional ERP project team

Why do you need a project team?

Your **ERP project team** is the group that will vet, select and guide implementation of your new system. So it's important to choose carefully. Here's what they're responsible for in the project.

-  Gathering input from other users outside of the project team
-  Researching, evaluating and selecting the ERP system
-  Setting specific goals and objectives for the project
-  Communicating the need for ERP and its benefits throughout the company
-  Choosing an ERP partner and collaborating with them to implement the solution

Tips for team success...

1. Aim for 5 to 8 members. Any more than that and you'll have too many cooks in the kitchen!
2. Team members should be well-respected, effective communicators who understand multiple parts of the business, not just their own area.
3. Don't overlook less experienced or junior team members – they bring a different (and valuable) perspective.
4. Make the implementation project a top priority. Help your team prioritize activities and make time for the project.
5. Clearly define responsibilities based on strengths, experience and bandwidth.

Other team roles...

- ▶ Executive sponsor (get buy-in early!)
- ▶ Super user (internal go-to person)
- ▶ Functional team members (system users)

Who should be on the team?

A strong ERP project team includes key employees from all areas of the business. Start with your org chart – which departments are impacted by a new ERP system? They should have input. This includes (but isn't limited to) accounting, purchasing, operations, sales, service, IT...and all other instrumental areas of your business.

Each team member will be responsible for gathering input from others in their business units. The goal is to discover what's working and what's not.

Then they'll bring that information back to the group for discussion. So, look for people that have operational knowledge, as well as strong communication skills. Communication is key throughout the project, but especially during requirements gathering. Each person on your selection team needs to be vocal to ensure their department's requirements are represented.

Why you need a project champion

Without someone leading the charge, there's a good chance your project will fall off the rails. Your project champion is focused on project management – keeping the ERP project on track.

- ✔ They're organized. They keep the project running efficiently, from the big picture to the fine details.
- ✔ They're punctual. They set the tone for the group and stick to deadlines.
- ✔ They're transparent. They keep the organization up-to-date on progress and are open to ideas from the group.
- ✔ They communicate well. They keep status meetings on track and handle challenges effectively when they come up.

Define your ERP objectives

What do you want to achieve with ERP?

This is the most important question to ask yourself and others on the selection team. Without a clear answer, you won't be able to properly measure the project's success later on.

But answering this question isn't always easy. So, we recommend breaking it down into a few smaller parts that will offer clarity on the bigger question.

What's your corporate objective?

The first step is to **get clear on the big picture**. There's likely a driving need that's prompting your ERP search. Start by identifying the source of the pain – this will often point you to your business objective.

How will ERP contribute to team objectives?

Getting meaningful measurement on the success of your project isn't just about the big company objective. You also need to understand how a new ERP will contribute to the objectives of each team and individual.

Remember that some objectives may not have a measurable contribution. Things like improved visibility or reduced business risk may not be quantifiable in dollars but they do contribute to the overall success of the company and the ERP implementation.

Do a gut check...

- ▶ Have you identified clear objectives?
- ▶ Can you put a value on the objective?
- ▶ Is it possible to achieve these objectives without ERP, in a reasonable timeframe?
- ▶ When do you want your ERP to be live?

Pro tip...

Identify the metrics you'll use to measure success.

Then track your current stats to compare against.

How do you identify the core business need?

-  Are you looking to speed up invoicing and collections processes?
-  Is customer satisfaction currently suffering due to long response times to requests?
-  Do you need improved visibility throughout the organization?
-  Do you need to better manage backorder procedures? Or better yet, reduce the frequency of backorders altogether?
-  Do you want to gain a better understanding of profitability on each job or project?
-  Where are you consistently running into delays and inefficiency?
-  Do you want to save money by reducing inventory costs?
-  Do you need improved capacity planning to better understand and allocate resources?
-  Are you looking to improve accuracy when billing clients to make sure you're not missing billable expenses?
-  Are you already using ERP but need a more robust and flexible system that will handle the changing needs of the business as you grow?

Outline your business requirements

Imagine if you were to simply plan your building renovation as you go – pushing out a wall here, adding a door there. The supporting infrastructure would be affected each time, and the cost of rerouting electrical systems alone would be much higher than if it were part of an overall design. Careful planning for your ERP system design is just as important.

Without a plan, costs will skyrocket as the design is reworked. Over time, you may ask why you're paying so much for your ERP system!

Properly **defining your business requirements** is critical to a successful project. Chances are your project team will have a long wish list of functionality. Unless you have an unlimited budget, it's likely not realistic to tackle them all right away. But your wish list becomes a valuable roadmap for the future.

To outline requirements, you need to understand your processes as they stand today. Consider the way people consume data, interact with the system and perform their work. Answering these questions will help you identify a good fit ERP.



What functionality do you need to keep?



What would make life easier for your team?



Do you fully understand your existing processes across the business?



What do employees say about their daily activities? Where do they get held up?



What are the roadblocks employees face with your current systems?



Can you identify areas for improvement?



Where will your business be in 10+ years?

Not all requirements are must haves!

If you have mostly 5's, be more critical about what's truly necessary.

Identify your critical success factors

In the previous step, you defined your objectives and created a functionality wish list. But, as we mentioned, not all items on your list will be essential to the success of your implementation.

Narrow the focus by defining critical success factors – the elements that are necessary to achieve your goals.

With your selection team, take a second pass at the master list of requirements. With your objectives in mind, use a rating system to **prioritize the requirements** and zero in on the true must haves. This will help you identify the deal breakers as you're reviewing solutions.

It's easy to identify things that have an immediate impact on your cash flow, like increasing revenue. But keep in mind that savings don't necessarily have to translate into a cash value. Streamlining operations, gaining visibility into inventory and increasing customer satisfaction may not immediately translate to cash, but they will impact the bottom line in other ways.

Sample rating system...

1 = Non-essential

3 = Nice to have

5 = Must have

Narrow the field...

Pick 2 or 3 ERP systems to evaluate in-depth. Any more will be overwhelming!

Dig deep on your top ERP contenders

Select 2 to 3 ERP solutions

You've done a ton of prep work so far – setting objectives and outlining requirements. With all your work in hand, head to Google! Do a thorough search to develop a list of software vendors that appear to meet your needs.

More traditional methods are also a great way to learn about solutions – trade shows, trade journals, suppliers, customers and accountants are all good sources of information. You can also reach out to ERP consultants for guidance.

Functionality is important. But be sure to **research the software vendor** as well. How long have they been around? How many customers do they have? What are people saying about their products? Given the investment you're making, you want to select an established software vendor, with a good track record.

Book meetings with ERP partners

While some vendors sell direct, we always recommend working with a partner if possible. They bring a deeper level of business expertise and tend to engage at a more personal level to ensure you get a best-fit solution.

Each partner will do a **discovery session** with key members of your team to understand your business and the challenges you want to solve. Be sure to clearly communicate your requirements and help them understand your existing processes (the good and the bad).

While business process is a big part of the discovery, a great partner will go a step further to understand your people and your culture. The information gathered helps the partner build a meaningful demo that showcases their product in the context of your business.

Setup demos to see how the software works for you

Each person on your ERP selection team should clear their calendar to **attend the demos**. You may also want to include executive sponsors in all or even part of the demos, so they can see the systems and ask any questions.

Give each member a copy of your requirements and grading criteria so you can have a productive discussion following the demos.

It's very easy for a partner to walk you through how their system completes specific tasks.

But what does the software look like for your business?

A good partner will come prepared with a script to show how the system will handle a few of your key business processes. This will demonstrate their understanding of your requirements and help you determine if the system will work for you (and improve your processes).

The demo should be done in a live version of the software. Never settle for a "demo" done using PowerPoint slides. It's a huge red flag – run!

A good demo will be tailored to your business, based on the requirements and objectives you identified earlier in the process. You should walk away with an understanding of how the software will fill gaps or improve your current processes and how new capabilities will positively impact your business.

Sample evaluation scale...

- 0 = Feature not available
- 1 = Major workaround / customization
- 2 = Third-party solution
- 3 = Minor workaround
- 4 = Available in current year
- 5 = Available out-of-the-box

Select the right ERP and partner

How to choose the best-fit software

By the time you get through demos, you should have a good sense of which ERP software is right for you. This is a good time to review your requirements and make sure your selection meets your critical success factors.

When it comes to technical fit, use the 80/20 rule.

You want a system that naturally fits your requirements (this is the 80%). The other 20% is what you'll need to tweak or customize to fit the processes that are unique to your business.

Some platforms are easier to customize than others, so you'll want to understand how much flexibility you have. At a basic level, you should be able to add custom fields. But if you need more complex customizations, ask your partner how that will be done and what impact it has on future upgrades.

Ultimately, you want the ability to tailor the system to fit your business in a way that's reasonable to maintain (from an effort and cost perspective).

Also consider how well the ERP solution plays with others. You might have systems that need to stay in place for one reason or another. Whether your current systems integrate with other tools or not, your new ERP absolutely should. The whole point of an ERP system is tying your data together, not separating it further.

How will this happen? Are there existing integration tools or frameworks that can be used? Do the other tools have open APIs that your partner can use to create an integration for you? If not, what's required to integrate the systems? Imports / exports? How often? An open discussion with your partner will help you understand the options and come to the best overall solution.

Have unique needs
that don't come
out-of-the-box?

We can build the
perfect solution!

[See our work >](#)

Customize only when necessary.

Change is hard. Your team may be reluctant to embrace new processes. But be open to new ways of doing things. You might be surprised to see that there's a faster, easier way to do the same task. And if it's already included in the software, you'll save costs on customization.

And what if you do need to customize? Choose your partner carefully. Many can accommodate small tweaks to the system. But if you need a more complex customization, the strength of your partner will be the critical success factor.

Ask them to provide examples of custom work they've done for other customers. And don't be afraid to ask about how the work is delivered – is development work done in-house or do they outsource to other companies?

Know the costs – all of them!

No one wants to be caught with hidden costs. Be sure you understand the **full cost of your system** and what's considered out of scope.





If you're concerned about cost, ask about a phased approach. You can implement functionality over time to spread out the costs and ease the transition for your team. Alternatively, there may be options for financing that allow you to spread out the project costs as you start to see the benefits of the new system.



Here are a few final questions to ask your partner to confirm solution fit.

-  How will the solution help achieve our identified objectives?
-  What does the user experience look like? How will our team access the system (e.g. via a web browser, VPN, mobile, etc.)?
-  Does the solution have flexibility to accommodate custom processes or workflows? What would that look like?
-  Can we integrate third-party tools and applications?
-  How often do we get access to software upgrades? What's the associated cost?
-  What's the implementation look like? How long does it take? What's our role?

If you're evaluating cloud ERP solutions (public or private), also consider asking:

-  Do we have the option to change hosting providers?
-  If we want to move to a new hosting provider or ERP solution, how can we get our data, in what format and at what cost?
-  Do we have control over when we upgrade to new versions?
-  Where is our data located?

Finding the right partner...

- ▶ How do they do business?
- ▶ Do their values and approaches align with yours?
- ▶ Do they understand your culture?

Select an ERP partner for the long-term

Your partner will become part of your business, working with you not only through implementation, but for years beyond that. Establishing a strong working relationship is essential to both initial and long-term success with your ERP system.

You want a partner that has extensive knowledge of the system itself and experience working with companies like yours. But you should also **look for fit**. Your ERP partner will become one of the most important relationships in your business. They're not just supporting mission critical systems. They're helping you grow the business. So it's important to get it right.

Do they understand your business?

Your ERP partner should have a broad view of your organization. Understanding your unique business structure, process, culture, and most importantly, your people sets the groundwork for a successful ERP implementation.

Look for a partner who has deep experience in the industry, with a reputation for implementing solutions on time and on budget. Ask about results they've delivered for other customers and speak with references.

You're looking for signals that your partner will remain as committed to your success in the future as they are during the initial sale.

Moving to a new ERP is a big change. And change is hard.

A good change management plan helps ease the pain for your team.

[Get the guide >](#)

What does implementation look like?

We all know the saying...time is money. Your ERP partner should have a solid implementation methodology to execute your project smoothly and quickly. The faster you're up and running, the sooner you'll see value!

Ask your partner about their approach (if they haven't told you about it up-front). You want to understand what the plan looks like, who's responsible for what and when your employees will need to be available. By the end of the discussion you should have a clear **roadmap for the implementation** – and beyond...

What comes after implementation?

By the time you go-live with your new system, your ERP partner will be embedded in your business. Their role is to ensure your system works as expected to help achieve your goals.

Be sure to understand what their support program looks like. Do they have a Help Desk you can contact for support? Can they provide additional training for your team if necessary? What kind of online self-help resources do they offer? And what about a regular review of your business needs?

Your ERP system is the backbone of your business – it requires care and maintenance to keep it running at peak performance. Your partner should be proactive in helping you identify and address new challenges as your business changes.

Helping people & technology work better together

Ready to start your ERP selection?

We'd love to hear where you're headed and see how we can help you get there.

[Book an intro call >](#)

As you can see, there's a lot to consider when selecting a new ERP system for your business. We understand that the shift can be daunting and disruptive. But it doesn't have to be.

Our mission is to ease the inevitable uncertainty that comes with an ERP project, helping you transition with the highest level of empathy, consideration and fit.

That's why we created this guide – to answer the many questions that come up in the process and give you a roadmap to follow in your journey.

As a leading Canadian ERP partner, helping small and mid-size businesses navigate ERP is what we do. Our experts have a depth of industry knowledge, a keen understanding of business process, and deep technological expertise that uniquely positions us to understand your business almost as well as you do.


We're here for you every step of the way – through selection, implementation and beyond.

Our solutions...

We've carefully vetted the ERP solutions we offer based on the needs of our customers. Working with two of the ERP leaders in the SME space, we can design the best-fit solution to grow your business. Public cloud, private cloud or on-premise, we've got you covered.

ORACLE
NETSUITE

SAP Business
One



We sell, implement and support best-in-class ERP software for small and mid-size businesses. We believe putting people first is the best way to make technology work for them. It's a conviction that sets us apart.

The shift to a new ERP system can be daunting and disruptive. But it doesn't have to be. We ease the inevitable uncertainty that comes with an ERP project, helping you transition with the highest level of empathy, consideration and fit.

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The human side of ERP