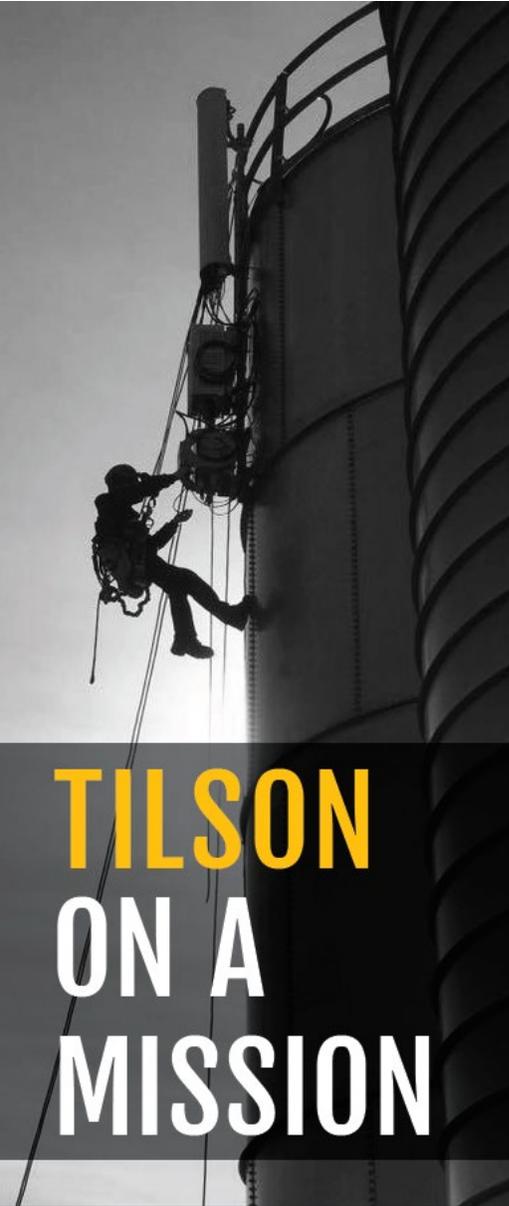


Structuring Your Software Selection

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Construction ERP Specialists
IT Strategy and Software Selection Advisors
Development and Data Services

- Construction ERP Implementations or Optimizations
- Software Selection
- Software Implementations
- Data Conversion
- Integrations
- SSRS, Crystal Reports
- BI Dashboards and Analytics
- Custom Development
- IT Health Assessments and Strategy

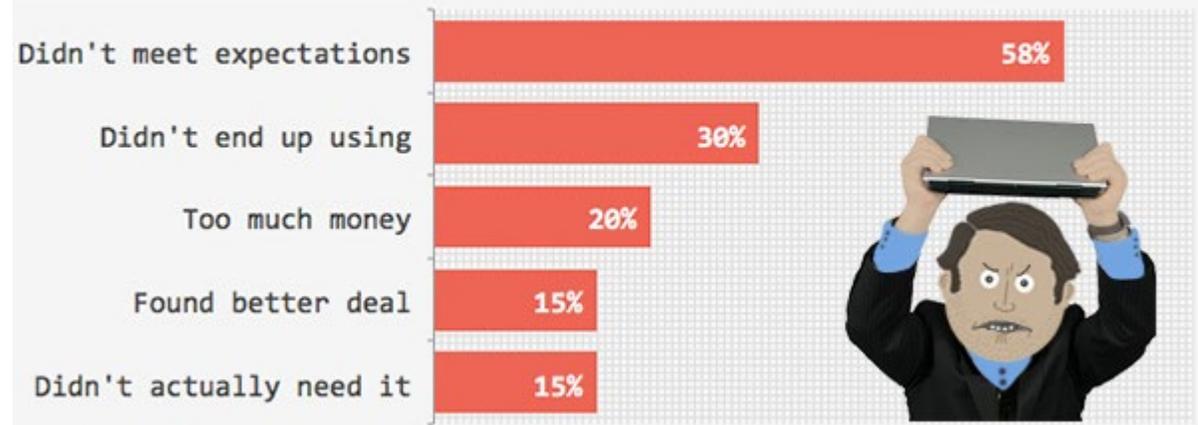
TILSON
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MISSION

What?

What is a Software Selection?

- Proactive planning and organization of a software purchase
- “Buyer’s Remorse” prevention technique

The most common reasons for buyer’s remorse
% of respondents who list the following reason for regretting a purchase (multiple answers accepted).



"Questioning demand: A study of regretted purchases in Great Britain"
(Skelton, Allwood); 2,036 responses gathered in March of 2015

theHUSTLE

<https://thehustle.co/how-to-avoid-buyers-remorse/>

Why?

Why Structure Your Software Selection?

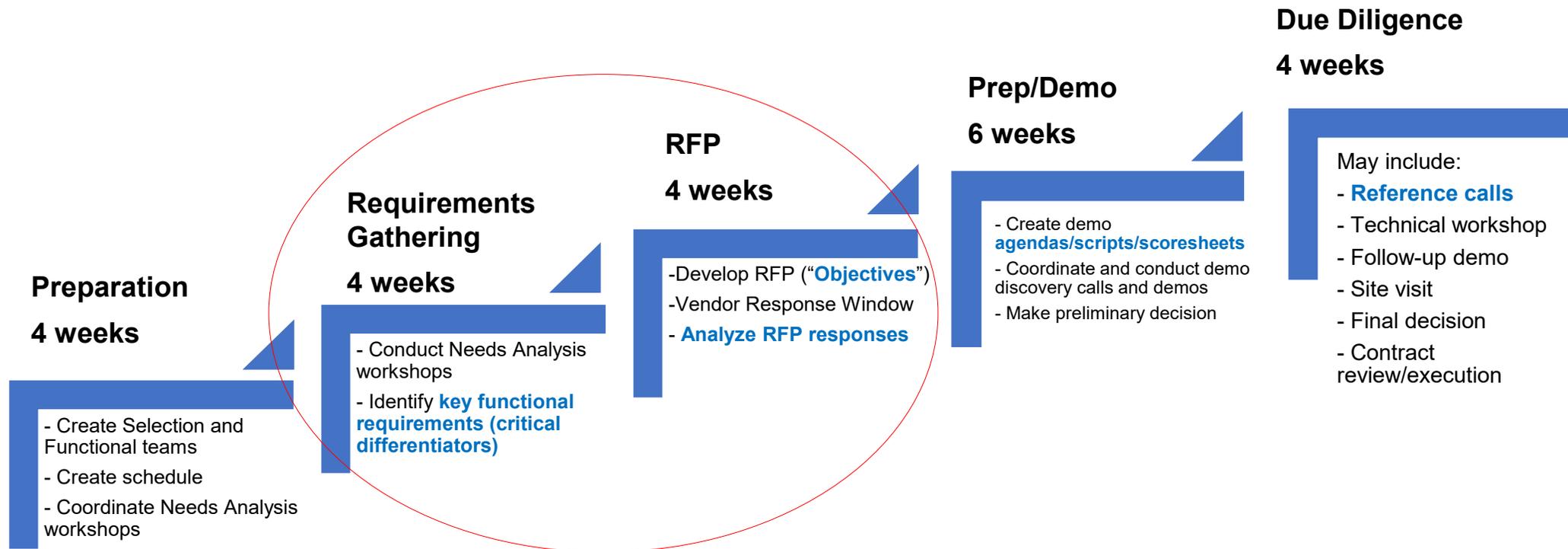
- Make decisions based on data instead of sales appeal
- Drive adoption through end user collaboration in the decision
- Promote efficiency in the decision process without sacrificing thoroughness
- Reduce business risk (money, time, resources)



How?

Stages and Components of a Structured Software Selection

Structure via process and *strategic, intelligently defined criteria and units of measure* to support qualified decision making.



Selection Activities - Preparation

Preparation (2-4 weeks)

- Assign a Selection Project Manager
- Identify Selection Stakeholders and their role in the process (*organizational structure – how are decisions made?*)
 - Selection Committee (*decision makers/recommending party*)
 - Evaluate current state IT governance
 - Functional Teams (*functional area subject matter experts, influencers*)
- Define high-level objectives (*process related functional improvements, better reporting, system stability, centralized data, reduce redundancy, streamline IT ability to manage/support/train*)
- Create schedule
- Hold kick off meeting with team
- Prepare for and schedule requirements workshops

Selection Activities – Requirements

Develop KEY Functional, Reporting, and Technical requirements list (*Needs Analysis Workshop output*)

System Requirements for a Multi-faceted World

Requires a holistic view of process workflows to end-result of what is produced.

- Identify specific pain points and their relative impact on Customer/Revenue/Other Processes
- Include *all* of the right roles/resources for a topic (“shouldn’t we include IT in this discussion?”)
- Consider reporting needs
- Include what works well now that you need to carry forward

How does the proposed solution meet the requirement?

- A. Core System Function
- B. Enhanced Configuration (time/effort)
- C. Customization (\$\$\$/time/effort)
- D. Not Available

Selection Activities – RFP

What is a Software Selection RFP?

- A document that outlines an organization's key requirements
 - Functional
 - Reporting
 - Technical
- Prioritized to align with *your company's objectives*
- Created in two parts:
 - **Comprehensive set of distinct system Requirements** that also require a vendor response
 - **Comprehensive document** outlining key details for response (see further breakdown on next slide)
- Used to solicit comparable vendor/solution proposals
- Ensures vendor has the right information to understand organizational conditions and objectives
- Establishes a structured response format - quality metrics for equitable analysis
- Provides vendor background information - assess vendor "strength" considerations

Selection Activities – RFP Document

Vendors need adequate information to understand your needs.

- Nature and location(s) of business operations, years in business
- Company size (revenues, number of employees)
- Current technology landscape
- Company objectives for the new system
- Anticipated growth trajectory
- Desired systems/modules
- Tech requirements/needs

High Level RFP Considerations

- Easy to underestimate the effort, start early; ongoing development
- Structure response requests to support *efficient response analysis*
- Typical response window is two weeks, influenced by the actual number of Requirements for response

Selection Activities - Demonstration

- Coordinate/schedule internally and with shortlisted vendors
- Prepare agenda and demo scripts
- Conduct vendor discovery prep calls
- Create demo score sheets
- Plan scoring analysis process
Carefully consider critical vs. non-critical requirements

ERP Demonstration Scorecard

NAME: _____

TITLE: _____

Rating Scale (based on meeting defined requirements)		
1	2	3
Does Not Meet	Partially Meets	Fully Meets

Business Area/Process	Vendor 1		Vendor 2	
	Score	Comments	Score	Comments
Project Creation/Setup				
Payroll Processing				
Equipment Management				

Selection Activities – Due Diligence

- Follow-up demo
- Technical Workshop – exploring security, APIs, hosting considerations
- Reference calls
- Peer-to-peer insights
- Final decision
- Contract review/execution

Questions