Chapter 4

Shall we dance?
Select a partner

TWO TO TANGO

cegeka

RFP-Checklist for ERP

A tool for companies embarking on an ERP selection process

1. WHAT IS IT?

This RFP-checklist for ERP is a tool for companies that are looking for a new ERP system or want to replace their current ERP software.

2. HOW CAN I USE IT?

You can use this document to question potential partners and suppliers about their expertise and ERP solution(s) in a clear and structured way.

3. IS IT COMPLETE AND USEFUL?

This document is merely a tool. It does not claim to be complete, or to cover all functions and needs of every company. What is it, then? A well-grounded starting point for companies facing the challenging and time-consuming task of starting an ERP selection process. This document gets you started by doing a good chunk of preparation for you.

4. IS IT OBJECTIVE?

We at Cegeka provide ERP solutions ourselves. On the other hand, we have more than 15 years experience with digital transformations using ERP and are perfectly able to provide companies that are on the brink of an ERP project with resources that will help them in their choice.

5. CAN I SELECT THE RIGHT PARTNER WITH THIS?

Not exactly. An RFP template helps you to map out a mass of basic information about potential suppliers and solutions in a structured way, but that is only a starting point, because ERP projects are not only about the technology, but also (and especially) about business processes and people. The right partner will guide you - like in a tango - in optimizing your specific processes. Use this document eagerly, but do not be blinded by functions & features.

6. IS IT INDUSTRY-SPECIFIC?

An RFP template for ERP consists of 2 parts. The first part is generic and can be used by any type of company in any industry, the second part is an industry-specific questionnaire.

Part 1

This part contains a general information sheet that can be used to present your organisation in a complete and structured way. We also provide a list of questions to ask potential suppliers. This concerns information about their:

- Activities
- Experience with IT, ERP, CRM
- Experience with your field of expertise and business processes
- Geographical spread
- Range of solutions
- R&D, investments
- Training offer
- Organisation of customer service and support
- Technical information

Part 2

This part contains a detailed questionnaire that can be used to gauge the presence of features in each domain of the proposed solution. Depending on your niche, this part consists of 300 to 500 questions on the various domains of ERP automation. These are questions that very specifically address the needs and 'business pains' that exist in your sector.

The industry-specific part can be obtained via a simple request to maud.dhave@cegeka.com.

Part 1

Required information

1. DESCRIPTION OF YOUR ORGANIZATION

Introduce your organization in a clear and concise manner. Include the relevant coordinates and key figures. Try to formulate a concrete answer to where your company wants to go, and how ICT should be able to respond to that.

1. Company name and status
2. Address
3. Number of establishments
4. Number of employees/users
5. Description of activity (possibly overview of products)
6. Brief history
7. Company objectives and values, and how ICT responds to them
8. Additional assets / Unique Selling Points
9. Some financial key figures
10. Composition of the organizational structure (insert organizational chart)
11. Composition of the Board of Directors (insert organization chart)

2. DESCRIPTION OF YOUR CURRENT ERP INFRASTRUCTURE

Describe your current ERP or custom solution. Be as specific as possible. Concisely state which processes are supported within this infrastructure, which are not, and which, if any, are captured by peripheral applications. If possible, specify why you chose your current solution at the time.

12. Supplier of your current solution
13. Name of your current solution
14. Platform on which your current solution was developed (if custom)
15. Date of initial delivery
16. Current version and date of delivery current version
17. Number of users (named / concurrent)
18. Automated processes within your current solution
19. Non-automated processes within your current solution
20. Any peripheral applications that fill this gap
21. Reasons for choosing these peripheral applications
22. Reasons for choosing the current solution.

Questions to the supplier

3. SUPPLIER DATA

Basic Data

23. What is the name and legal form of your organization?
24. When was your organization founded?
25. How many branches does your organization have?
26. Please provide the coordinates for each branch.

Employees

27. How many full-time employees in total work for your organization?
28. Give the number of employees per establishment/country.
29. How many employees fulfill a role in ERP?
30. How many employees fulfill a role in CRM?
31. How do you see the number of employees evolving over the next 3 years?

Solutions

32. What ERP solutions does your organization offer?
33. What CRM solutions does your organization offer?
34. What other IT solutions does your organization offer?

Target audience

35. Which sectors or industries do you target with your solutions?

Customers

36. How many customers does your organization have in total?
37. How many customers does your organization have by country?
38. How many customers does your organization have per sector / industry (in Belgium / Netherlands)?
39. How many customers does your organization have per sector / industry (international)?

Questions to the supplier

Business Partners

40. Does your organization have any partnerships with other partners?
41. Please provide the name of these partners.
42. Describe the solution(s) you offer with these partners.

Awards

43. Does your organization have any certificates and/or awards?
44. Provide the name of these certificates and/or awards
45. When were these certificates and/or awards awarded and until when are they valid?

Turnover

46. What is the total turnover of your organization?
47. How much is your organization's turnover for your own country?
48. What is your organization's turnover for other countries (by country)?

Distinguishing power

49. How does your organization differentiate itself from the competition (list 3 unique points, 6 lines maximum per unique point)

Questions to the supplier

4. DATA ABOUT THE ERP SOLUTION

Basic data and versions

50. What is the name of the solution you are proposing?
51. What version of the solution are you proposing?
52. What is the release date of this version?
53. Do you know the planned release date of future versions?
54. With what frequency are new releases released?
55. How quickly are legal obligations implemented in the solution?
56. Is there an additional cost for each new release or is it included in the maintenance cost?
57. How is the price of the new release determined, if it is not included in the maintenance cost?

Positioning

58. Why do you propose this solution compared to other solutions in your portfolio?

Target group

59. What sectors / industries are you targeting with this solution?
60. Does the solution you are proposing include industry-specific add-ons?
61. Which add-ons are involved and why?References
62. On average, how many users do your customers count for this solution?
63. Give at least 4 relevant references with a similar business activity

Distinctiveness

64. What do you think are the 3 main advantages of this solution (with or without add-ons) over the competition?

Solution/Turnover

65. How much turnover does this solution represent for your organization in Belgium/The Netherlands?
66. How much turnover does this solution represent for your organization in other countries?

Questions to the supplier

Solution/customers

67. How many customers do you have in total with this solution?
68. How many customers do you have in total with this solution in your country?
69. How many customers do you have in total with this solution in other countries?
70. How many customers do you have in total with this solution in our sector / industry?

Solution/employees

71. How many employees in total are working within your organization for this solution?
72. How many of them are consultants?
73. How many of these are developers?
74. What is the retention rate of these employees?

Investments, Research & Development (R&D)

75. How much is invested in the solution annually by your own organization?
76. How much is invested in the solution annually by (a) third party(ies)?
77. On average, how much is spent annually on R&D by your organization?
78. What is the percentage of this relative to total revenue?
79. On average, how much does your partner(s) spend on R&D annually?
80. What is the percentage of total turnover?
81. On which solution development points have you focused in the last three years and why?
82. On what development areas in the solution will you focus in the next three years and why?

Internationality and multilingualism

83. Is the solution available in multiple languages?
84. What languages are currently available?
85. Are there concrete plans to expand the language offering?
86. Which languages are expected and when?

Questions to the supplier

87. Does the solution support multi currency?
88. Is the solution financially 'compliant' in different countries?
89. For which countries is it compliant?
90. How does the solution handle changes in the relevant legislation?

Security

91. Can you ensure the security of the data in solution?
92. Is security provided at the level of job profiles within the organization?
93. Is security provided at the level of enabling and disabling functionalities?
94. Is security provided at the level of user groups?
95. Is security provided at the level of content (e.g. project leaders only have rights for the projects he/she is assigned to)?
96. Is security provided at the company level (e.g. someone has access to finance and sales in company X, but only access to sales in company Y)?
97. Is integration with Active Directory possible?

Methodology

98. What methodology do you use to implement the solution at customer site? Please describe in maximum 2 pages how this methodology ensures that:

- The quality, lead time and cost of the project are managed.
- Knowledge gained in one project phase is utilized in the next project phase(s).
- Employees understand the system and want to use it.
- The quality of the implementation team is guaranteed.
- The main risks of an ERP project are captured to the maximum extent.

99. How do you implement the solution in countries where you do not have a physical office?
100. How do you support customers in countries where you do not have a physical office?
101. What is the average lead time of a total project in terms of delivery time and implementation steps?
102. What effort is required from the customer to respect these times?

Questions to the supplier

Training

103. What training do you provide for management (C-level), administrators, key users, and end users?
104. Is there any physical training material? In what form will this be made available?
105. Is there digital training material? In what form is this made available?
106. Can you provide the training at the client's premises?
107. Can you provide the training at your site?
108. How much time should the client provide for training?

Support: helpdesk

109. Does your organization have its own support department?
110. How much turnover does this department represent?
111. How many employees does this department have in total?
112. How many dispatchers work in this department?
113. How many functional consultants work in this department?
114. How many technical consultants work in this department?
115. How many system engineers work in this department?
116. What other profiles work in this department?
117. What is the average experience of these employees expressed in years?

Support: Reports

118. Does your support department handle incidents? How does the workflow work?
119. Does your support department handle change requests? How does the workflow work?
120. Does your support department handle service requests (requests for optimizations in the near future)? How does the workflow work?
121. Does your support department handle requests for secondment?
122. Please give a percentage of how many of what types of requests this department handles? (e.g. x % incidents, y % service requests etc.)
123. Please indicate the percentage of time spent on each type of request this department handles (e.g. x % time on incidents, y % time on service requests etc.)

Questions to the supplier

Support: Channels

124. What tool do you use to follow up on reports?
125. In what different ways can customers log reports?
126. Please provide percentages of how often each way is used by your customers (e.g. x % via portal, y % by phone etc.)

Support/Contracts

127. Can support be offered without a support contract?
128. Can support be offered with a support contract, but without the option of paying for services in advance?
129. Does the customer receive an overview of the services to be paid afterwards?
130. Can support be offered with support contracts but with the option of paying for support in advance in the form of credits?
131. Does the customer get an overview of the credits spent afterwards?
132. Do credits have an expiration date?
133. Can credits be used by different profiles?
134. Can support be offered based on incidents?
135. What guarantee is there to protect against possible bugs?
136. How many years is the warranty against bugs?

Technical Information

137. What hardware requirements must the solution meet?
138. What network requirements does the solution need to meet?
139. Which operating systems are supported?
140. Is there a preference for a particular operating system?
141. Which operating system is preferred and why?
142. On which database does the solution work?
143. In what programming language is the solution written?
144. Is it possible to develop in the solution using this language?
145. In which programming language are reports drawn?
146. Is the solution object-based or character-based?
147. Is it possible to use the solution remotely? What kind of mobile devices and technologies are supported?

Questions to the supplier

149. Can the solution be interfaced with Microsoft Office?
150. Is data exchange with external service providers possible?
151. What formatting languages are supported for this purpose?
152. Is there a preference for a particular markup language?
153. Is data exchange possible with other applications?
154. Through which integration technology is this done?
155. Give some examples of integrations with other applications.
156. Is EDI interfacing supported?
157. With which EDI solutions has a standard link been established?
158. Is an EDI module an integral part of the standard solution?
159. Does the solution have a SOA architecture?
160. If it is not yet available, when is it expected?
161. For which Microsoft Windows versions is the solution already certified?
162. What ICT security should be provided for your solution?
163. Can screens be personalized with respect to tab order, input field per user?
164. Can menu structures be customized?
165. Can menu structures be linked to the user level? (role-based)
166. How easily does the solution support growth at the user level?
167. How easily does the solution support growth at the country/world level?
168. How easily does the solution support growth at the acquisition level?
169. How does the solution support workflows (max 10 lines)?
170. In what way can data be used across different companies?

Questions to the supplier

149. Can the solution be interfaced with Microsoft Office?
150. Is data exchange with external service providers possible?
151. What formatting languages are supported for this purpose?
152. Is there a preference for a particular markup language?
153. Is data exchange possible with other applications?
154. Through which integration technology is this done?
155. Give some examples of integrations with other applications.
156. Is EDI interfacing supported?
157. With which EDI solutions has a standard link been established?
158. Is an EDI module an integral part of the standard solution?
159. Does the solution have a SOA architecture?
160. If it is not yet available, when is it expected?
161. For which Microsoft Windows versions is the solution already certified?
162. What ICT security should be provided for your solution?
163. Can screens be personalized with respect to tab order, input field per user?
164. Can menu structures be customized?
165. Can menu structures be linked to the user level? (role-based)
166. How easily does the solution support growth at the user level?
167. How easily does the solution support growth at the country/world level?
168. How easily does the solution support growth at the acquisition level?
169. How does the solution support workflows (max 10 lines)?
170. In what way can data be used across different companies?

Did you think this document was useful?

Then don't forget to request part 2!

The second part is an industry-specific questionnaire that goes more in-depth for your sector.

You can obtain the part that applies to your sector and organisation free of charge by simply sending a request to maud.dhave@cegeka.com.

TWO TO TANGO

cegeka

MAIN OFFICE:

Corda3
Kempische Steenweg 307
3500 Hasselt
Belgium

Follow or contact us

maud.dhave@cegeka.com

www.linkedin.com/showcase/cegeka-business-solutions

www.twitter.com/cegeka

www.facebook.com/cegeka

WWW.CEGEKA.COM/EN/BE/DYNAMICS365

TWO TO TANGO