

## OVERVIEW

The SuccessERP Software Selection Toolkit is designed to serve as a structure for a company to move through the selection of a new system. It consists of video tutorials, documents and spreadsheet templates that are used by the team at SuccessERP in a full service engagement. The general toolkit is divided into seven segments:

1. Internal Team Selection
2. Requirements Generation
3. Software Selection
4. Vendor Implementation Team Selection
5. Designing the Software Demonstration
6. Negotiating the Contract
7. References

The advanced toolkit contains more detail in each of the seven segments, and contains two additional segments:

1. Industry-Specific Requirements
2. Advanced Functionality

## GENERAL SOFTWARE SELECTION TOOLKIT SEGMENTS

The following segments are part of the General Software Selection Toolkit.

### CHOOSING YOUR INTERNAL TEAM

Your own team has the final responsibility of a properly implemented system. The toolkit covers the different rolls in the team, their responsibilities, different personality styles and their interactions with each other.

### GENERATING THE REQUIREMENTS

There are usually only a few key reasons that new software is required. The toolkit provides tutorials and tools for focusing on what is important rather than getting caught in all the possibilities of what could be done or improved.

### CHOOSING THE SOFTWARE

Software comes in many different sizes, strengths, platforms, and prices. The toolkit educates you on the different types of software, helps you decide what level you need, and keeps you focused on what your business requirements are.

## CHOOSING THE TEAM

Over 50% of project success is due to the vendor team chosen. Software selection may be important, but vendor selection is perhaps even more important. The toolkit guides you through selection criteria for the vendor team and its individual members.

## THE DEMO

The software demonstration is usually the pinnacle of the evaluation. The toolkit shows you the difference between the vendor sales demo team and the vendor implementation team, and helps you create a fair demo process so that you keep the focus on your requirements rather than on what the vendor wants to show.

## NEGOTIATIONS

The negotiation segment covers risk management as well as monetary matters. The toolkit shows you what to focus on in a contract, what to avoid, where and how to ask for discounts, and how to mitigate project risk at a contractual level.

## REFERENCES

References do not typically sway a decision from one vendor to another. Rather, they validate assumptions made during the selection process. The toolkit will educate you on what to expect and on what to ask during the reference check process.

## ADVANCED SOFTWARE SELECTION TOOLKIT

The Advanced Software Selection Toolkit contains everything in the General Software Selection Toolkit, as well as additional detail in each of the segments pertaining to techniques that can be used by companies that typically are:

- Above \$5,000,000 in annual revenue
- Are growing at a rate of 15% or more per year in annual revenue
- Using complex operations such as international financial management, manufacturing operations or rental management.

It utilizes methods that apply to a larger group of people in the company (e.g. ways to conduct requirements interviews across the organization that do not require the same amount of time as would be required for key individuals). It also contains the following additional segments:

## SPECIFIC BUSINESS TYPES

- Food Sector

- Automotive
- General Manufacturing
- Service
- Rentals
- Clothing

Check back with us if other sectors have been added to this list as we occasionally do add to the list over time.

**ADVANCED FUNCTIONALITY**

- International
- Multi-Location
- Inventory

Check back with us if other functionality has been added to this list as we occasionally do add to the list over time.

**HIGHLIGHTS AND PRICING COMPARISON OF GENERAL AND ADVANCED TOOLKIT**

	General Toolkit	Advanced Toolkit
Internal Team Selection	Yes	Also includes team balancing traits
Requirements Generation	Yes	Also includes interview scanning technique
Software Selection	Yes	Yes
Vendor Implementation Team Selection	Yes	Yes
Designing the Software Demonstration	Yes	Also includes techniques for larger demonstrations
Negotiating the Contract	Yes	Yes
References	Yes	Yes
Industry-Specific Requirements	No	Yes
Advanced Functionality Requirements	No	Yes
30 minutes of Phone or Skype Support	Yes	Yes
Video Tutorial Segments	9	9
Documents	11	20
Spreadsheet Workbooks	7	7
Price	\$250	\$350

To purchase the general or advanced version of the SuccessERP toolkit, please contact:

SuccessERP Inc.

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206.965.9333

We will provide you with a URL to make the transaction and receive the toolkit.