



EXECUTIVE ERP AND PSA EVALUATION AND INVESTMENT ROADMAP

Developed for the Modern Services Organization

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Grab a seat and enjoy.
Read Time: 10 minutes

EXECUTIVE ERP AND PSA EVALUATION AND INVESTMENT ROADMAP

Developed for the Modern Services Organization

In today's business world, there are a multitude of technologies to consider and the task of choosing one or more may seem daunting. Although choosing the right solution and provider for your organization may be a long, taxing process, the rewards can be substantial. The right solution, implemented efficiently and built to enable the business's strategy, can:

- Increase efficiencies across the entire organization.
- Improve your profit margins through better visibility into your partners, vendors and customers.
- Increase resource utilization.

I have built this guide in collaboration with our business process experts at NetSuite to help you and your team make a decision about the solution that works best for you and to help set you up for a successful implementation.

The process outlined in this guide is a widely accepted evaluation process and is a valuable exercise for any major technology implementation project.

How will this guide help you to successfully select a software platform? First, it will help guide you toward the reason and value for making a change; second it will align your organization on the specific benefits of a new software solution across all of your operations and financial processes.

Thank you for taking the time to meet with me and review the Executive ERP and PSA Evaluation and Investment Guide—I hope to be given the opportunity to work through this process with you.

Sincerely,

Why are we beginning this journey?

Should our organization be looking at purchasing new software?	Yes	No
Does your current system architecture require duplicative and/or redundant data entry?		
Does lack of flexibility hurt your company's ability to keep up with new and more complex business processes?		
Is key information and business intelligence unavailable throughout your company?		

How does your business make money, and what is the breakout?

What are your top business process challenges?

Strategy

Building and executing a strategy is essential in achieving your organization's long-term vision. Use the section below to establish key strategic points in various areas of your organization to help align your internal priorities. This will not only help identify day-to-day priorities, it will also help identify priorities in a digital solution.

<p>Sales Are you tracking leads and opportunities in a CRM system?</p>	<p>Project Setup Do you track time to project tasks or just at the project level?</p>
<p>Project Management What is the average length of a project?</p>	<p>Product Sales (Reselling Hardware or Part of a Job) What system are you using for quoting/estimating?</p>
<p>Managed Services Contracts Do you track projects for each contract?</p>	<p>Resource Management Do you manage your resources in a centralized or decentralized way?</p>
<p>Billing and Revenue Recognition What are your lines of revenue and how do you bill and recognize revenue for each one?</p>	<p>Financials Do you manage one tax ID or multiple tax IDs?</p>

Your Organization at a Glance

High Level Overview	
Revenue	
# of Employees	
# of Offices	
# of Contractors	

Key Metrics and Business KPIs	
Gross Profit Margin	
Utilization	
Annual Rev per Billable Consultant	
Days Sales Outstanding	
Time to Close the Books	
Finance FTEs per \$100M USD Rev	
IT FTE per \$100M Revenue	
Grow Profit Margin	
Write Offs	

Current Technology Environment & Functional Areas

Current systems:	Application (specific vendor or homegrown)	Keep or Replace	Integration needed?
Financials (ERP)			
GL, AP, AR			
Billing and Invoicing			
Revenue Recognition			
Fixed Assets			
Inventory			
Subsidiary Management (how many tax IDs)			
Payroll			
Company Level Budgeting			
Professional Services Automation (PSA)			
Project Setup			
Time Capture			
Expense Management			
Project Management (WBS – Excel, MSP, etc)			
Resource scheduling (white boards, Excel, homegrown)			

Current systems:	Application (specific vendor or Homegrown)	Keep or Replace	Integration needed?
CRM and other			
Lead and Opportunity Management			
Estimating/Quoting			
Marketing Campaigns			
Document Management			
Ticketing or Case Management			
Dispatching			
HRIS			
Payroll			
Benefits Management			
Recruiting Management			
Performance Management			
Onboarding			

Engage and Align

The Engage and Align section of this document can be used to review the technology environment throughout your organization. The suggested use of this section is to:

1. Speak to the process owners and have them describe the workflow.
2. Draw the process.
3. Identify the process gaps, breakdowns and shortfalls.

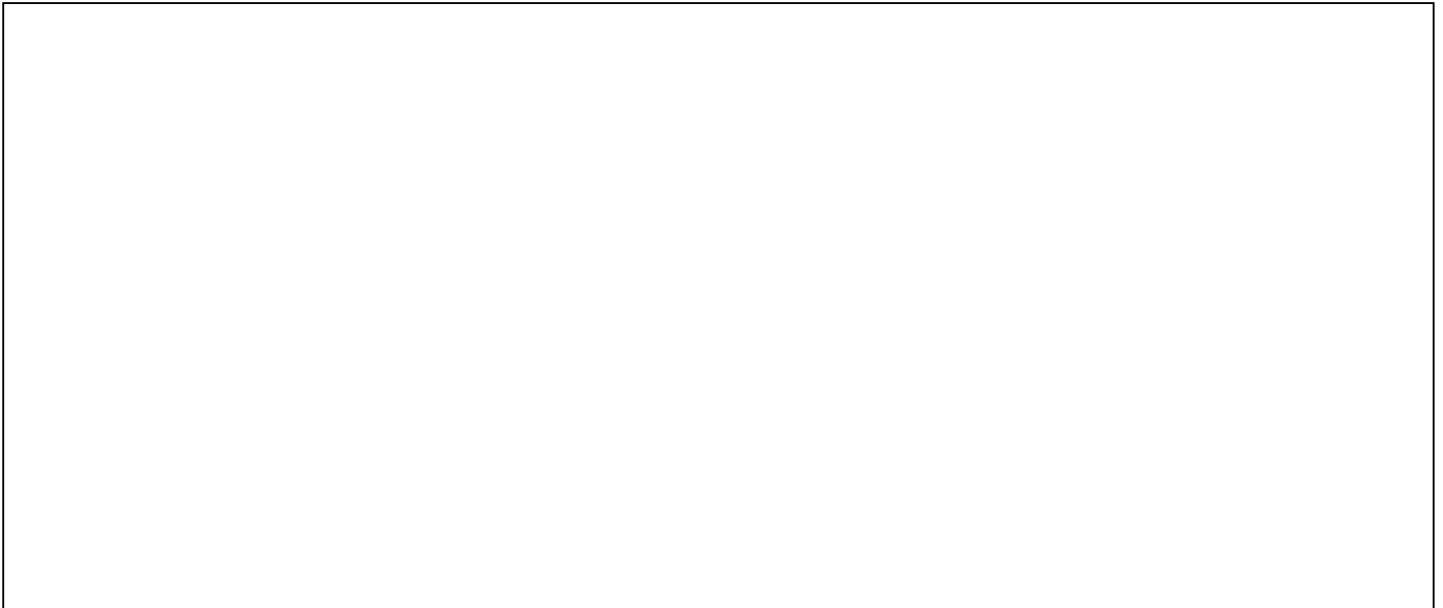
Once you know the details and opportunities within the entire process, you can better understand the monetary opportunity by streamlining each part of the process.

Technology Environment Workflow Diagram

Owner

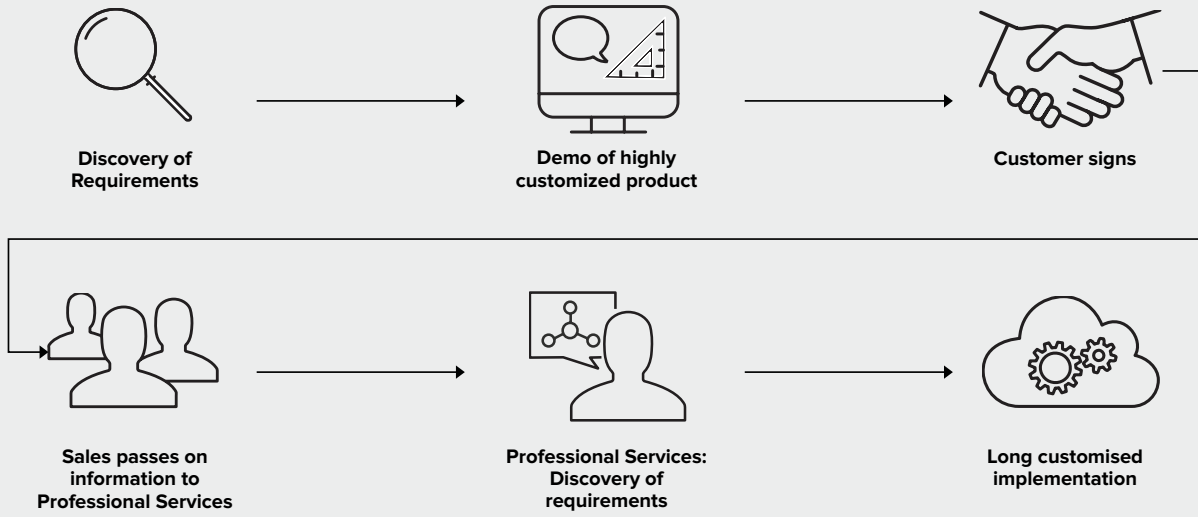
Description

Draw

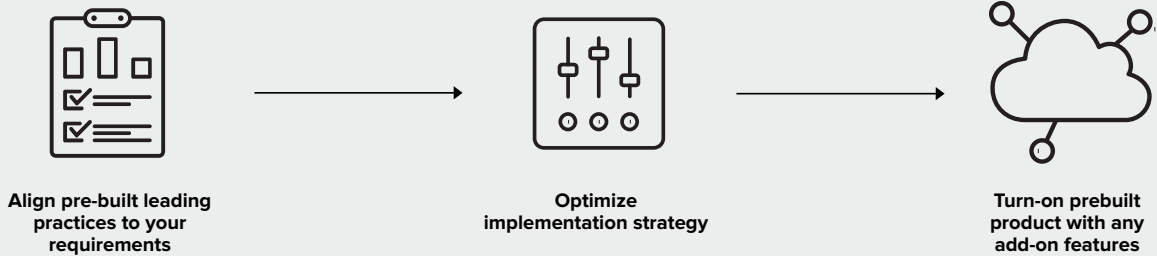


Process Breakdowns and Shortfalls

Traditional Evaluation and Implementation Model



Our Model

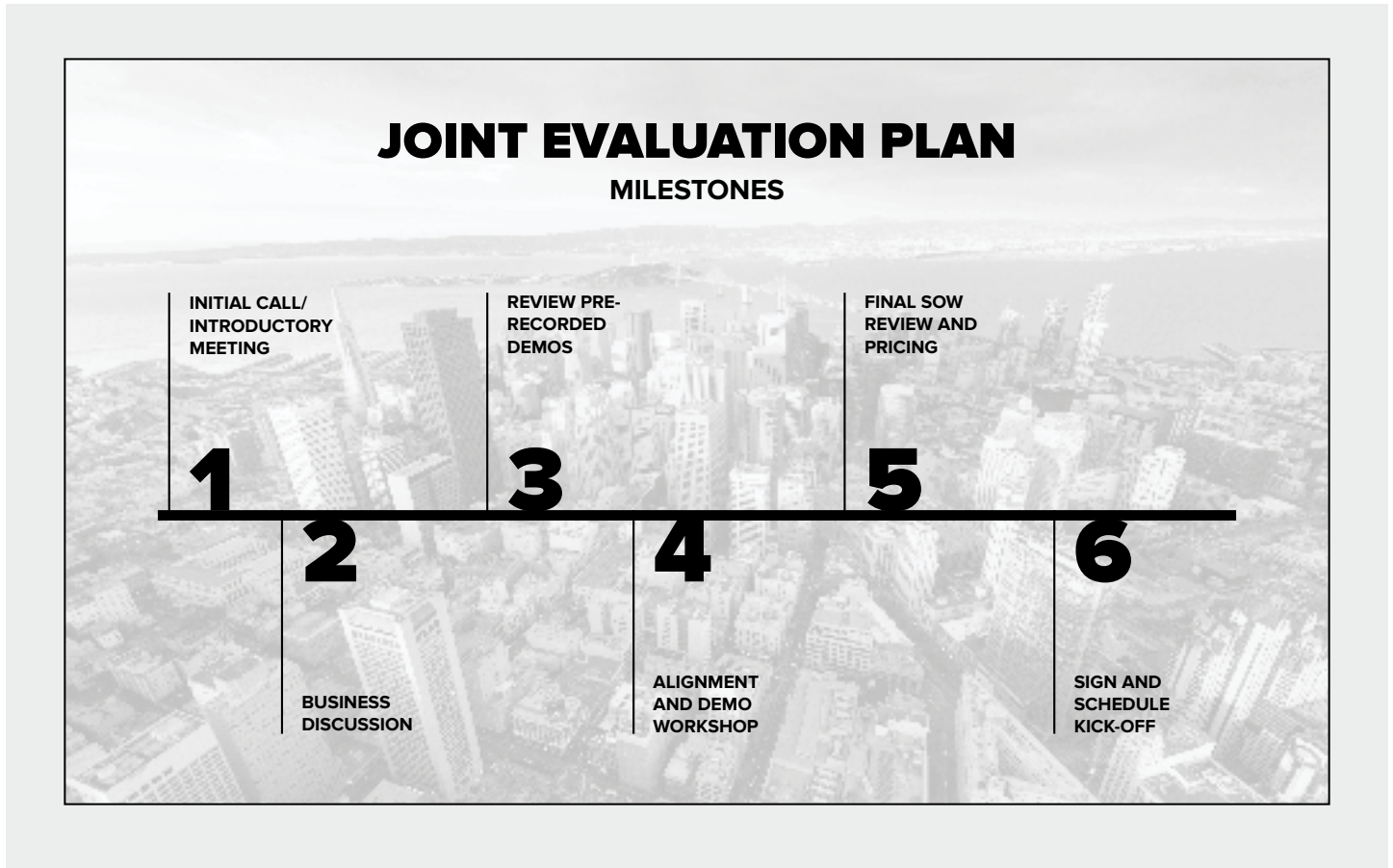


**SELL WHAT WE DELIVER AND
DELIVER WHAT WE SELL.**

**GO-LIVE IN
UNDER 100 DAYS.**

Joint Evaluation Plan

The Evaluation process for a new digital solution and partner can be challenging and time consuming. The Joint Execution Plan (JEP) can be used to track key milestones and deliverables throughout the SuiteSuccess engagement.



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