



C L I E N T S  
F I R S T

P A R T N E R  
2

P A R T N E R  
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## ERP PARTNER SELECTION CHECKLIST

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Is the partner is a cultural fit with your organization? Is the company team comfortable to work with during the sales process? Review bios of the consultants and/or schedule calls with the team leaders if needed.

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Does the partner brings diverse expertise, skill sets and experiences in each project team. Ask how they approach projects. Do they have a team approach with experts in the various business areas such as Finance, Manufacturing, or line of business such as MRO, Professional Services, etc.?

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Does the partner have consultants with expertise for your industry? If they have recently hired or have been working towards references in a new industry, carefully assess the value for your project and perhaps even ask for a discount on services.

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Does the partner offer more than two or three software solutions? Do they provide solutions for many different industries? If so, ask how they manage and support the diversity.

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Has the partner developed industry specific intellectual property to enhance the software offerings as necessary? If so, this shows a deep understanding of client needs with the talent on staff to deliver a complete solution.

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Does the partner contribute to their software user group and have special recognition within their industry?



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Current global business needs should be considered even if it is not an issue now, it could be in the future. Does the partner have experience and / or an understanding of global business success?

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The partner offers accessible top-level ERP technical service and support providers for solution-specific expertise. Executives are available to meet with you and discuss their company's culture and experience.

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Is the partner's quote clear and was it approved by their consulting team? Does it state that it is an estimate and out of scope work will require approval? From our experience, fixed fee projects should be avoided.

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The partner's sales team offers quick turnaround time on references that are relevant to your business.

✓		
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Does the partner only use internal staff to implement their software unless certain 3rd party products are needed? Check references on any add-on products.

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The partner leverages a comprehensive, transparent approach to ERP implementation. They offer access to a portal or similar tool for client access to project status, tasks, budgets and the ability to reach project consultants via cell phone as needed.

[www.clientsfirst-ax.com](http://www.clientsfirst-ax.com)

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The partner's methodologies are provided during the quoting process and based on experience. You are provided with service options that can allow for light, medium or heavy partner assistance. This allows flexibility for your team to assist in areas of the implementation that fit their knowledge. Never try to implement ERP software yourself.

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Does the partner offer technical mentoring? They should be open to allowing your team to get a deep understanding of the system if desired.

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Does the partner give you an estimate of how many consultants will be assigned to your project. Large projects should have a team for Finance, Supply Chain and Manufacturing, Projects, Industry specific areas, such as maintenance, repair and overhaul (MRO), industrial manufacturing, etc.

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Contracts should be easy to read and understand. Other than payment terms you have no contractual agreement and may terminate the relationship if desired.

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