



An engineering and construction company selects the right ERP system for their business needs and processes.

Optimum helps client assess and document their business processes and requirements for a new ERP system and evaluate and select the right commercially available ERP solution to fully meet their business and user needs.

Industry

Engineering and Construction

Country

United States

Challenges

The client used various disparate systems and spreadsheets to manage their projects, clients, invoicing and finance, and contractors involved in each project. Most data entries and aggregations were done manually or using Excel files and the integration and transition of data between different systems was not accurate and timely. Because of the decentralized data and many systems of record, the client was facing reduced efficiency and lack of timely and accurate project and financial reporting.

Optimum's Involvement

Optimum assessed and documented the client's current business processes, systems, and data for the implementation and rollout of a new, commercially available Enterprise Resource Planning (ERP) solution. Optimum then conducted an evaluation and assessment phase to define the desired user and system requirements of the new ERP and performed analysis of the potential ERP solutions. Optimum also helped in the successful solicitation and selection of the new ERP solution and vendor.

Results

At the end of this assessment and vendor selection project, the client's current and to-be business processes, systems, and data requirements were fully defined and documented, and the new ERP solution and the implementation vendor was successfully selected. This new ERP platform, Sage Intacct, will provide robust management, aggregation, and reporting of projects, assets, resources, contractors, and financials for the client.

The Client, an engineering and construction firm, engaged Optimum to conduct a current state analysis and assessment of their data, systems, and processes and develop the new business processes and user/system requirements for the selection and/or in-house implementation of a new ERP system.

Working with the client to understand the current and desired state, Optimum assembled a team of experts, including a process engineer, ERP solution architect, and business analyst to help assess the current state, develop the requirements and scope of the new ERP, and performed cost-benefit analysis for pursuing a commercially available ERP system vs. building a custom solution in house.

After defining the requirements and scope of the new ERP solution and considering the integrations required with other business systems, it was determined that a commercially available ERP solution is the best fit for client’s business and user needs as well and budget and timeline requirements of this project. Given this business decision, Optimum then conducted market research and developed a solicitation/RFP package (including scope, requirements matrix, evaluation criteria, pricing proposal sheet, etc.) to be provided to ERP vendors for competitive bidding on this project.

Optimum’s team also stayed engaged in the evaluation process and helped to conduct vendor demos, evaluate vendor responses, and select the final ERP solution and vendor for this project.

ERP Vendor Evaluation Form



	Criteria	ERP Solution 1			ERP Solution 2			ERP Solution 3		
		Points	Weight	Total	Points	Weight	Total	Points	Weight	Total
Reference and Experience (20%)	Vendor references indicating optimal client relationship/past performance	10%			10%	0		10%	0	
	Past projects depicting Vendor’s ability to successfully complete work	10%			10%	0		10%	0	
	Demonstrated understanding of project scope and requirements	5%			5%	0		5%	0	
Technical Qualifications and Proposed Solution (50%)	Company and Project Team credentials and technical qualifications	5%			5%	0		5%	0	
	Solution’s ability to connect/integrate with core systems (as stated in the BRD)	10%			10%	0		10%	0	
	Solution’s ability to replace the legacy systems and tools (as stated in the BRD)	10%			10%	0		10%	0	
	Solution’s ability to provide robust and customizable BI/reporting capabilities	10%			10%	0		10%	0	
	Proposed solution design, execution approach, and work plan	5%			5%	0		5%	0	
Cost/Pricing (30%)	Project timeline and high-level schedule	5%			5%	0		5%	0	
	Implementation costs	10%			10%	0		10%	0	
	Maintenance costs/fees	10%			10%	0		10%	0	
	Other/additional costs/fees	10%			10%	0		10%	0	
Total:		0	1	0	0	100%	0	0	100%	0

Points	Rating Category	Description
0	Does Not Meet	Does not meet the criteria at all or major functionality is missing.
1	Slightly Meets	Limited ability to meet criteria with serious deficiencies.
2	Partly Meets	Deficiencies in meeting the criteria, effort is required to work around.
3	Mostly Meets	Largely meets criteria, workarounds can be implemented with minimal effort.
4	Fully Meets	Adequately meets the criteria with no workaround or additional efforts needed.

II. Product Overview

Respond to each requirement to the right with an 'x' in the appropriate box. Use the space provided below each section to explain any 'N/A' or other answers. Attach pages to your bid document as needed to demonstrate how your solution meets the requirements listed below.		Yes	No	N/A or other
A. Overview				
1.	Is the product offered as SaaS?			
2.	Does the product include functionality (either inherently or through integration with existing systems) for project time, cost, and resource management?			
3.	Does the product include project management functionality related to planning (either inherently or through integration with existing systems)?			
4.	Does the product include project management functionality related to management and tracking (either inherently or through integration with existing systems)?			
5.	Does the product include project management functionality related to accounts receivable and project accounting functionality (either inherently or through integration with existing systems)?			
6.	Does the product include project management functionality related to timekeeping and resource tracking (either inherently or through integration with existing systems)?			
7.	Does the product include project management functionality related to contract and vendor management (either inherently or through integration with existing systems)?			
8.	Does the product include project management functionality related to invoicing (either inherently or through integration with existing systems)?			
9.	Does the product include project management functionality related to progress reporting (either inherently or through integration with existing systems)?			
10.	Does the product include project-related associated workflows and notification (either inherently or through integration with existing systems)?			
11.	Does the product include dashboards depicting project and portfolio related KPIs and metrics (either inherently or through integration with existing systems)?			
12.	Does the product include real-time reporting and data integration?			
13.	Does the product include a log with an audit trail of users accessing and making changes to the system?			
14.	Does the product include a mobile application available for Apple and Android products?			

About Optimum

Optimum is a modern Software Solutions and Services firm, transforming businesses through the power of People, Innovative Technologies, and Automated Processes.

By utilizing our expertise and experience in strategic planning, process optimization, and innovative technologies, our clients gain clarity and productivity, reduce operational and labor costs, ensure compliance, and enable business automation and transformation.

Optimum offers a full suite of software services and solutions, including Software Development and System Integration, Microsoft Dynamics ERP Assessment and Implementation, Office 365 and SharePoint Development and Consulting, Business Process Automation and Optimization, Business Intelligence (BI) and Data Warehousing, Work Automation and Project Management Software Solutions, Blockchain and IoT Solutions, and IT Staff Augmentation. Learn more by visiting www.optimumcs.com or contact info@optimumcs.com | 713.505.0300 to speak with one of our process engineers and ERP experts.