



EXECUTIVE ERP AND PSA EVALUATION AND INVESTMENT ROADMAP

Developed for the Modern Solution Provider

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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 Solution Provider

Today, there are a multitude of technologies to consider to help run your business, 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 decide which solution works best for you and to help set yourself 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?		

What are your top business process challenges?

How are the challenges impacting your organization today?

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.

Sales	Project Setup
Projects	Product Sales (Reselling Hardware or Part of a Job)
Maintenance Contracts	Resource Management
Billing And Revenue Recognition	Financials

Your Organization at a Glance

High Level Overview	
Revenue	
Cash	
# of Employees	

Key Financial Metrics	\$ USD	% of Revenue
Expenses		
SG&A		
AR		
AP		
DSO		
Days to Close		

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	
Write Offs	

Current Technology Environment & Functional Areas

Current systems:	Application (specific vendor or homegrown)	Integration needed?	Keep or Replace
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)			
Projects, Time and Resources			
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)	Integration needed?	Keep or Replace
CRM			
Lead and Opportunity Management			
Estimating/Quoting			
Marketing Campaigns			
Document Management			
Ticketing or Case Management			
Dispatching			

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.

Technology Environment Workflow Diagram

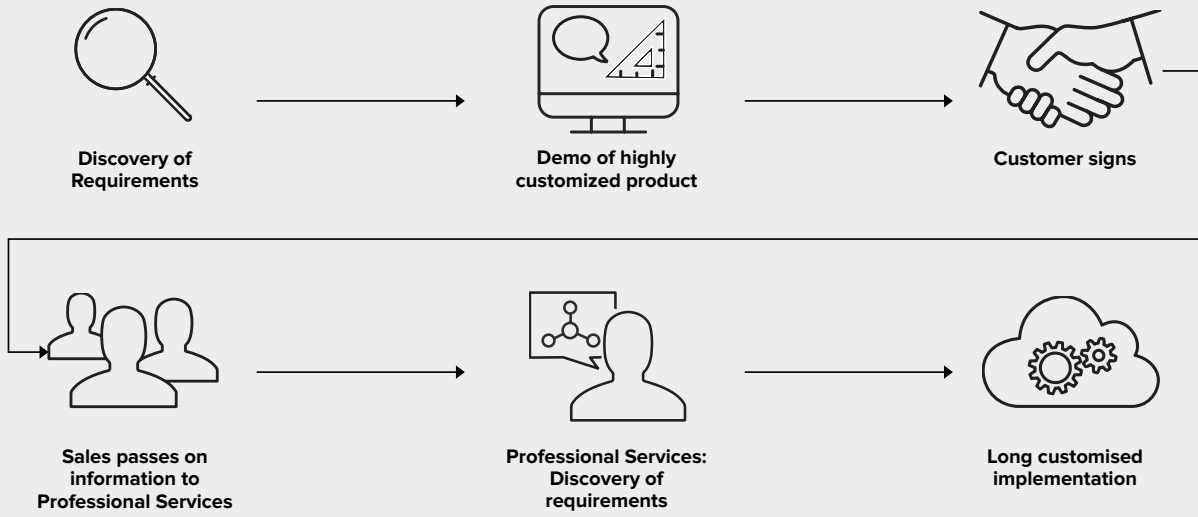
Owner

Description

Draw

Process Breakdowns and Shortfalls

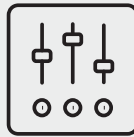
Traditional Evaluation and Implementation Model



Our Model



Align pre-built leading practices to your requirements



Optimize implementation strategy



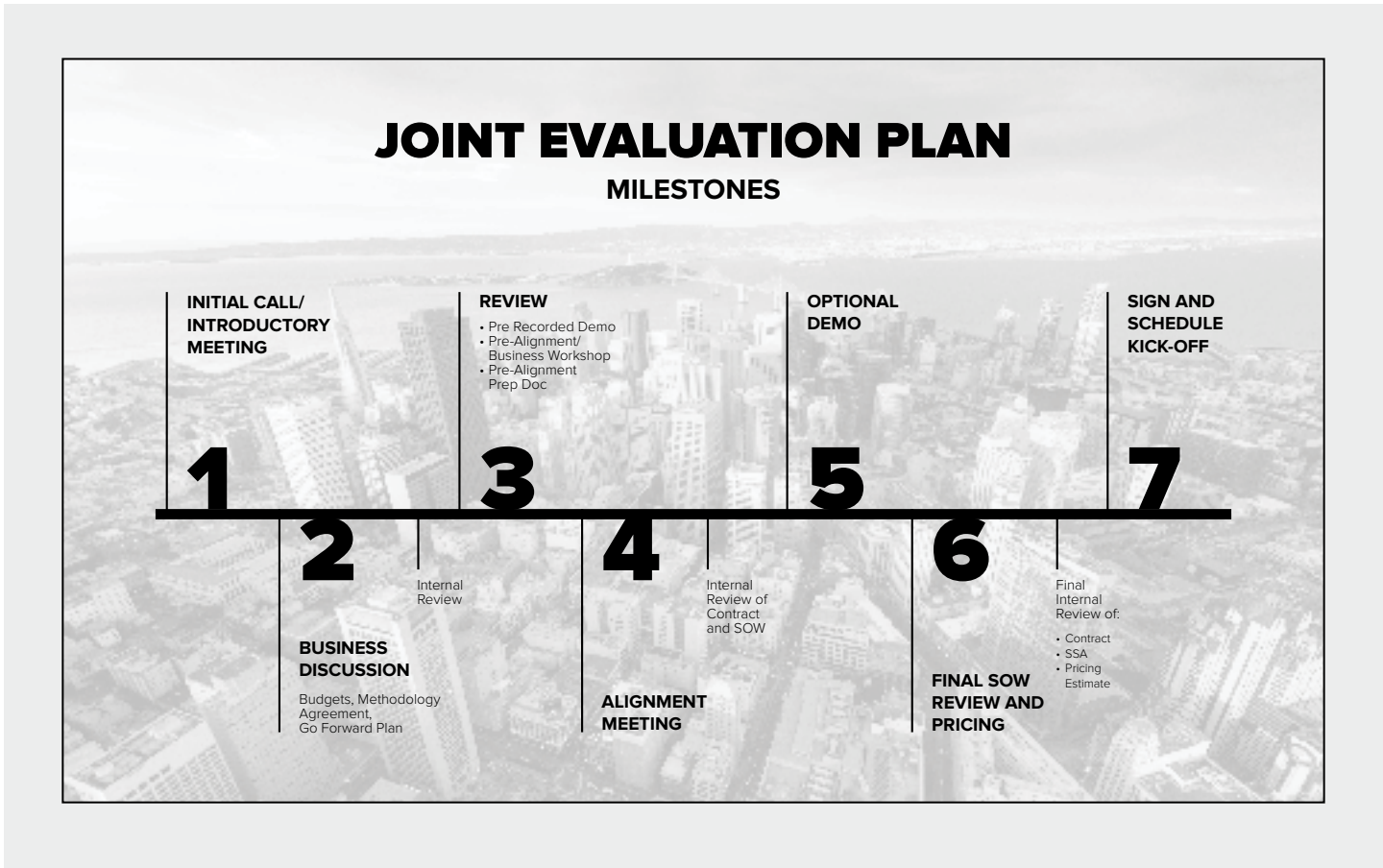
Turn-on prebuilt product with any add-on features

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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