

ERP Evaluation Request for Proposal Worksheet

Use this outline to prepare a request for proposal (RFP), a questionnaire, or a meeting with a prospective solution provider

1. Vendor information

- Contacts (including name of CEO)
- Address
- URLs, e-mail addresses, and phone numbers
- Locations
- Years in business
- Doing business under other names (DBAs)
- Company owned by
- Most important partnerships

2. What the vendor offers

- Vendor's vision of business and technology
- Why vendor believes it is a valuable resource and a good fit with your organization
- Software and other products offered by the vendor
 - Software licensed through software manufacturers
 - Solutions created by the vendor
- Services provided by the vendor
 - Continuous support
 - IT training
 - User training
 - Customization and coding
- Warranties, assurances, and upgrade plans

3. The business relationship

- Availability of financing
- Preferred financial terms
- Licensing models
- Vendor to provide software and all related support and services, or would you consider several vendors?
- Contracts and agreements used by the vendor. Vendor to provide sample contracts and agreements for review

4. Solution or product the vendor is proposing

- Name of the solution
- Number of installed customers
- Provide or attach a description of the solution
- Have you conducted any return on investment studies for this solution with existing customers? Can you share the results?
- What can you say about the upgrade path or product roadmap?
- What type of demo is available?

5. Customer referrals for the solution

- Contact information
- Industry and type of business
- Contact information
- Products implemented



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6. Expected cost

- Software only
 - If software is modular, can modules be licensed separately?
 - Separate cost of modules
- Support, training, and other services available from vendor
- What costs are expected for travel and consulting before and during the implementation?

7. Business concerns you want the solution to address.

Vendor should comment about how their solution can address these issues. In this section of the document, you can use the findings from the business scenarios as source material. You might want to abridge and edit the findings so you don't disclose any confidential information.

8. Technical capabilities you want in the solution.

You can present this as a detailed yes/no checklist. Or you can indicate what features are absolutely essential, important, helpful, and just nice to have. Here is an example of a possible features list a business manager might draw up for inventory management:

Inventory general features

- Online query with drilldown
- Work orders with job cost
- CAD integration
- Engineering change management
- Bar code tracking
- Customer-owner inventory
- Security to prevent unauthorized alteration of records
- Customer-owned inventory and warehouse fees
- Item Lookup by description, attributes, and catalog
- Warehouse stock status

Inventory item master information

- User-defined part numbering conventions
- Multiline item descriptions
- Technical specifications can be attached
- Shelf life indication
- Procurement alert/flag
- Flag for inspection needed
- Ship weight and dimensions
- Consignment inventory
- Movement class
- Preferred vendor with last purchase details
- Alternate vendors
- Vendor part numbers
- Product lines item occurs in
- Pricing and discounts by warehouse
- Bill-of-material maintenance to support kiting, rework, repair, and subassemblies
- Multiple units of measure
- Contract pricing
- Customer rebates
- Hazardous materials
- Split cases
- Vendor and manufacturer warranties
- Sales commissions
- Special receiving instructions

Inventory quantity and cost information

- Multiple warehouses
- Distribution centers
- Multiple bin locations
- Real-time available to promise (ATP)
- Negative quantities on hand
- Standard, average, actual, and other costing methods
- Lot and serial tracking
- Landed cost

Inventory transactions

- Cycle counting
- Real-time posting of all activities
- Warehouse transfers
- Mass-change cost revaluation
- Mass price change
- Automatic creation of payables vouchers
- Audit trail details
- Receiving
 - Anticipated receiving schedule
 - Checks over/under amounts by percentage limit
 - Receive subject to inspection or testing
 - Damaged items
 - Vendor returns
 - Customer returns and repairs
 - Prints return merchandise authorization (RMA) shipping labels at customer site
- Adjustments
- Automatic exception reporting
- Discontinued and superseded items
- Conversion of items to dead stock with write-off
- Floor stock tracking

Inventory replenishment

- Suggested stocking levels
- Automatic ordering
- Automatic creation of work orders
- Automatic stock transfers
- Contract shipments

Inventory reports

- Inventory activity report
- Inventory ranking
- Inventory financial analysis
- Inventory price list
- Sales projections
- Sales/profit by salesperson
- Customer contract price list and history
- Problem sales orders and invoices

Inventory integration with other systems

- Integration of inventory with financial management
- Integration of inventory with human resources and payroll
- Integration of inventory with manufacturing
- Integration of inventory with customer relationship management (CRM)
- Integration of inventory with project management

International requirements for inventory management

- European value-added tax (VAT)
- Canadian goods and services tax (GST)
- German physical inventory requirements
- Quarantine for inspection
- Inventory revaluation

9. Technical requirements

- Operating system for servers and desktop computers
- Hardware platform
- Integration and interoperability needs
- Business productivity software
- Databases
- Third-party solutions

10. Implementation process

- Vendor to describe typical needs assessment and implementation processes
- Who performs the implementation?
- What disruptions are expected?
- Length of time needed for implementation
- How does vendor perform testing and validation of the solution's functionality?
- How does vendor resolve problems and issues that occur during implementation?

11. How vendors should respond

- How do you return vendor responses: E-Mail, hardcopy, CD, DVD?
- Contact name
- Address
- How do you get in touch with the vendor, if questions occur?
- Timeline

