



How to Avoid the Biggest Pitfalls When Selecting a New ERP

A practical, business-led selection playbook | CPE Session



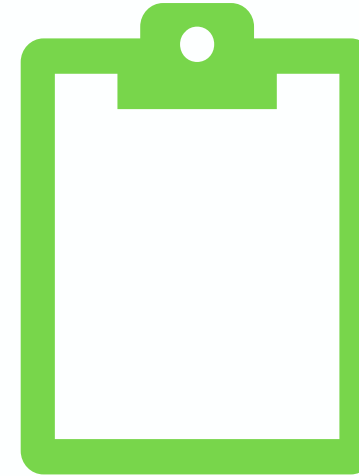
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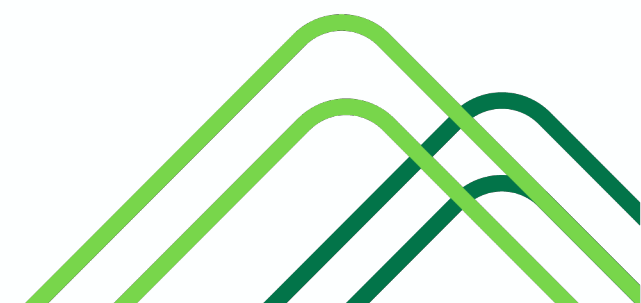
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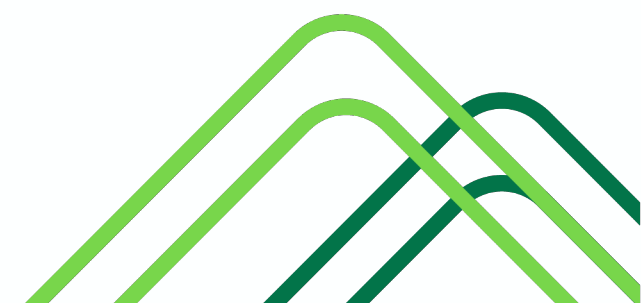


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Today's Presenter



Cary Grigg

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Cary Grigg has over 20 years providing portfolio, program, and project management services to strengthen and transform organizations. He specializes in internal audit, project management, and various management consulting roles focused on risk identification and management.

Cary's experience lies in process optimization, ERP selection and implementation, and operational systems, leading projects that enhance order-to-cash, procure-to-pay, and record-to-report processes. He has managed large-scale ERP implementations, optimizing workflows through process redesign, technology integrations, training, and change management. He assists clients with complex data conflicts across siloed systems, improving business reporting and management.



Today's Presenter



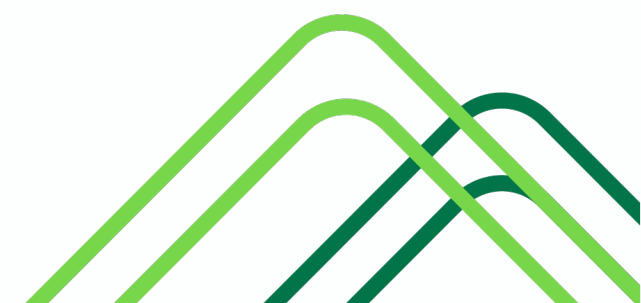
Josh Anders
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Josh Anders has built a strong track record as a transformation and process improvement leader with deep expertise in digital transformation, ERP implementations, and enterprise-wide operational modernization. He has directed numerous large-scale initiatives that identify inefficiencies, redesign workflows, and implement technology solutions delivering measurable gains in efficiency, accuracy, scalability, and user adoption. Experienced across the full transformation lifecycle, from discovery and requirements definition through execution, and organizational change management.

He combines strong methodological and process driven capabilities with proven strengths in modernizing legacy operational processes, including Procure-to-Pay, Order-to-Cash, FP&A, and Design to Build. Josh has also led strategic sourcing transformations and automation initiatives that reduce manual effort while strengthening controls and decision-making.



Today's Path: From Risk to Confident Selection

This session is structured around the five decisions that create the most implementation risk and the checkpoints that prevent them. Follow this path to move from uncertainty to a defensible, evidence-based ERP choice.



ERP Selection Failures Usually Start Before Implementation


The visible symptoms: blown budgets, missed go-live dates, & user resistance appear late in the project. But the root causes are planted during selection, often months earlier. By the time failure is obvious, the cost to correct it is enormous.

Visible Symptoms

- Budget overruns
- Missed go-live dates
- User resistance and low adoption
- Scope and rework spirals

Hidden Selection Causes

- Unclear business outcomes
- Weak requirements discipline
- Demo-led decisions without evidence
- Unvalidated data and integrations

 Choose based on evidence, not energy.



Pitfall 1: Starting with Software Instead of Business Outcomes

When teams open RFPs before defining what success looks like, the vendor's feature list becomes the de facto strategy. A clear outcome model keeps selection anchored to measurable business value — not marketing materials.

Define Business Outcomes

Specify the operational, financial, and compliance results ERP must enable, before any vendor contact begins.

Tie to Measurable Value Drivers

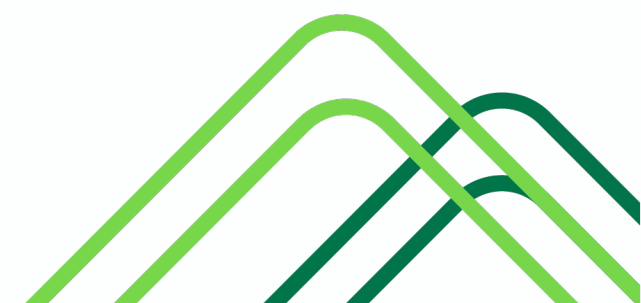
Link each requirement to a quantifiable outcome: cycle time reduction, error rate improvement, or compliance coverage.

Validate with Process Owners

Functional leaders, not just IT stakeholders, must confirm that the outcomes reflect how the business actually operates.

Separate Must-Haves from Preferences

Strategic requirements must be distinguishable from nice-to-haves before scoring begins. Don't conflate the two.



Pitfall #2: Letting the Requirements List Become a Junk Drawer

- Hundreds of uncontextualized requirements give vendors nowhere to fail and your team nowhere to score
- Prioritization separates what must work on day one from what would be nice someday. Cut the noise before vendors amplify it.

HOW TO RANK REQUIREMENTS



Pitfall 3: Mistaking a Polished Demo for Proven Fit

Vendor demos are rehearsed performances. Without a scripted scenario tied to your actual process, you are evaluating the vendor's presentation team, not the software. Scripted scenarios turn vendor theater into comparable, scoreable evidence.

Define the Scenario


Build demo scripts from your highest-risk, highest-volume business processes, not the vendor's preferred use cases.

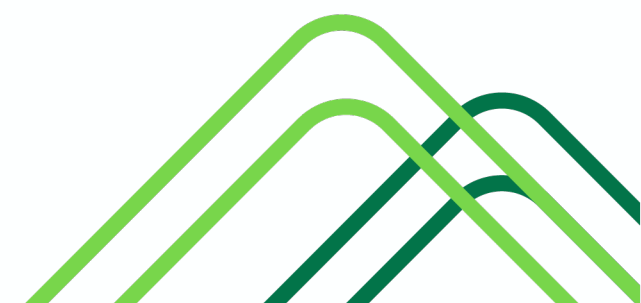
Require Live Evidence

Ask vendors to execute the scenario in a configured environment, not slides. Workarounds must be disclosed and documented.

Score Consistently

Use a shared rubric across all evaluators so scores reflect contextualized capability. Separate must-haves from enhancements.

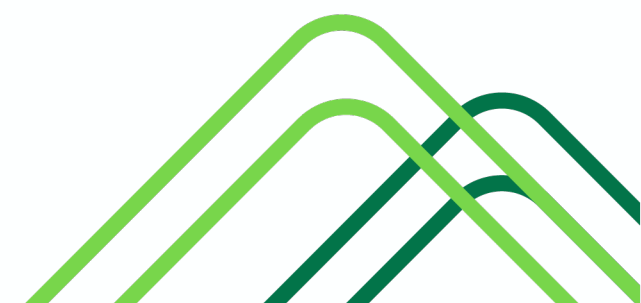
 **Looks great. But can it run your process?** Always ask vendors to demonstrate your scenario in a way that is fully contextualized and meaningful to the desired future state.



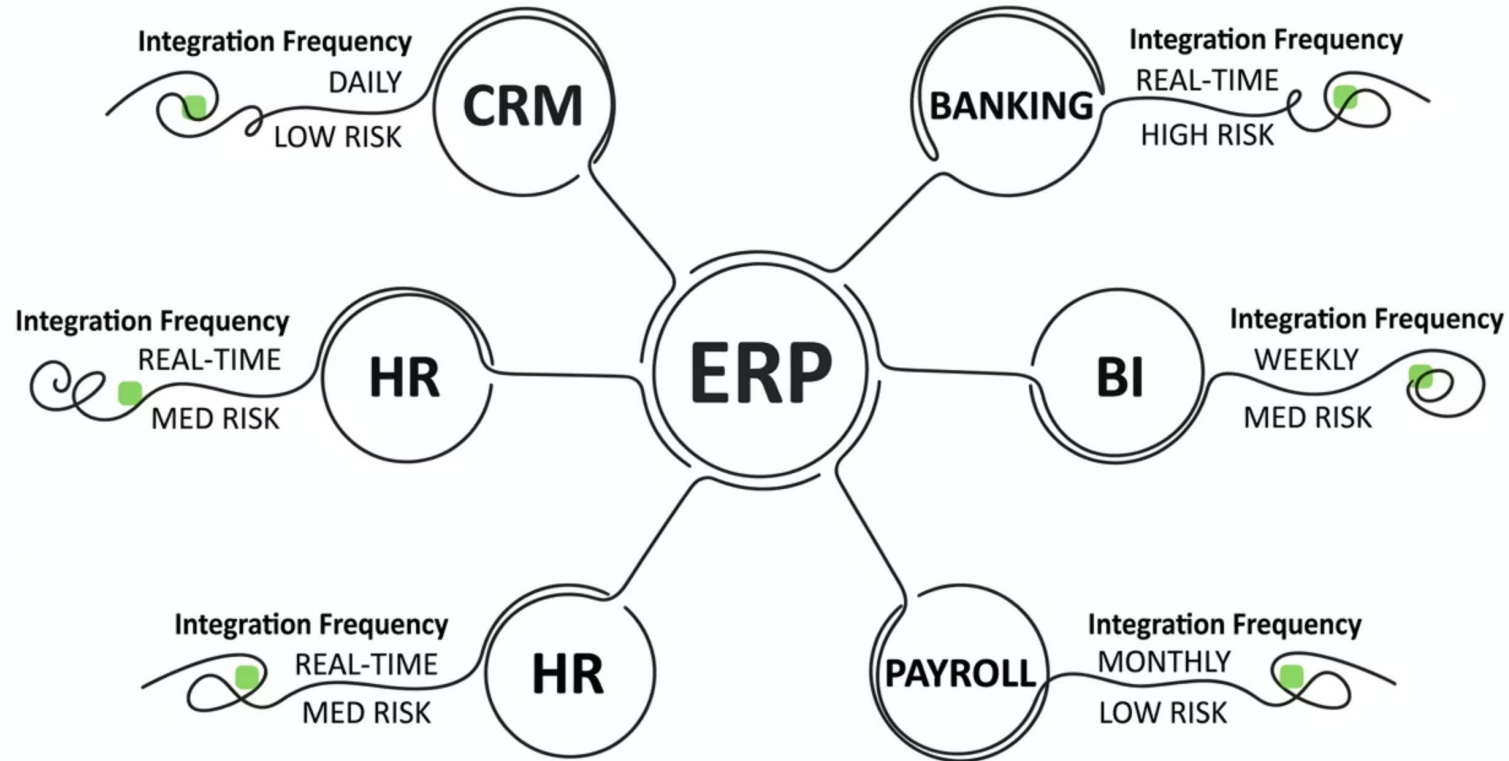
Polling Question #1

Which tool do you believe is most effective for ensuring software demos support an objective evaluation process?

- A. Day in the Life Quote to Cash Demonstration
- B. Requirements scorecard
- C. Stakeholder feedback survey
- D. Vendor Q&A document



Pitfall 4: Discovering Data and Integration Complexity Too Late



01

Profile Your Data

Assess customer, vendor, item, and chart-of-accounts data for completeness, duplication, and cleansing effort.

02

Map Integration Points

Identify every connected system, its owner, data frequency, and known failure modes before scoring vendors.

03

Estimate Cleansing Costs Early

Data cleansing effort must be included in the business case before approval — not discovered during implementation.

Pitfall 5: Weak Engagement and Governance Slow Decisions

Without active stakeholder engagement and a clear decision model, every trade-off becomes a debate, and every disagreement escalates to leadership. Selection drift — scope expanding, timelines slipping, alignment eroding is almost always an engagement and governance failure, not a vendor problem.

Stakeholder & Governance Roles



Executive Sponsor

Owens the business case and aligns stakeholders across functions



Steering Committee

Aligns business units and approves scope and vendor decisions




Process Owners

Engage end users, validate fit, and sign off on demo scoring

Engagement & Governance Questions

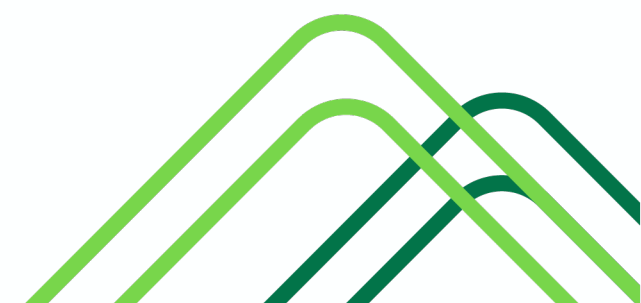
- Which stakeholder groups must be consulted before scope changes?
- Who resolves trade-offs between business units?
- How and when are end users engaged in vendor demos?
- What evidence is required at each decision gate?
- How are dissenting stakeholders heard and reconciled?

 **Engage stakeholders early. Govern decisions tightly. Selection follows.**

Polling Question #2

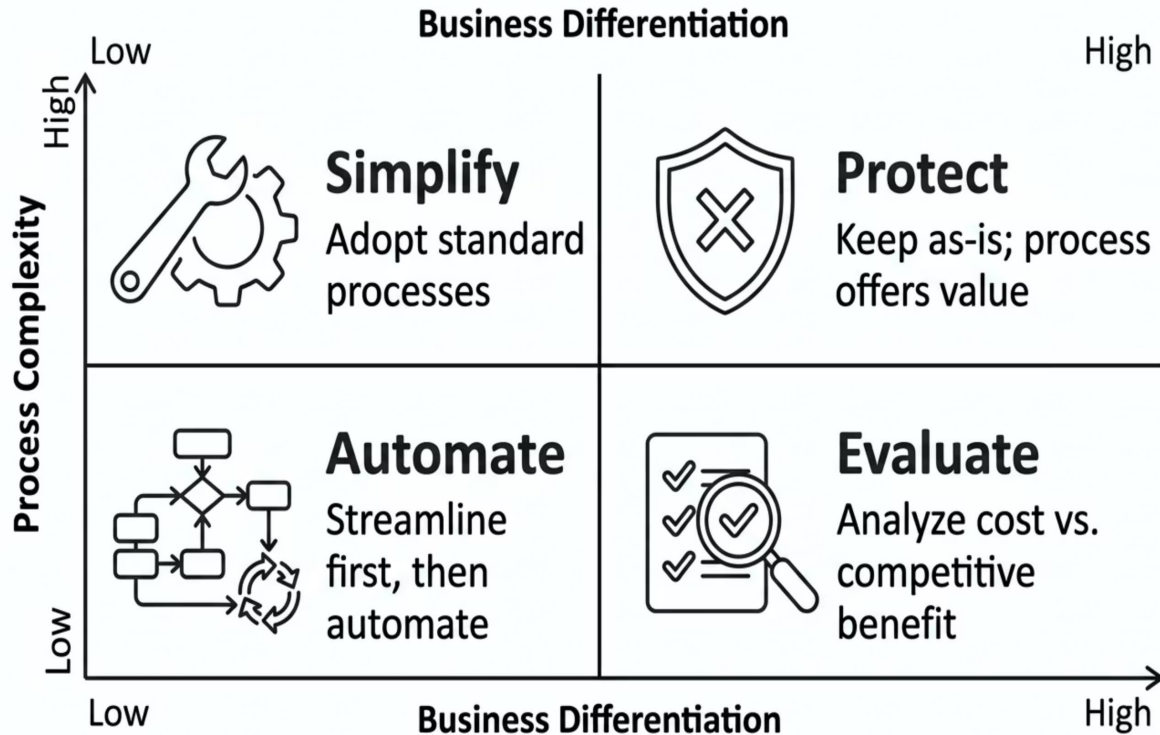
At what stage should key stakeholders be actively involved in evaluating a new solution?

- A. Before requirements are defined
- B. During requirements gathering
- C. During vendor demonstrations
- D. Throughout the entire selection process



Pitfall 6: Buying Customization Before Challenging the Process

Every customization adds implementation cost, extends timelines, and creates technical debt that compounds with every upgrade. Fit-to-standard works, but only when the team has been disciplined about identifying where differentiation genuinely matters to the business.



Does it create advantage?

Only customize processes that directly create competitive differentiation. Everything else should follow the standard.

Can policy change instead?

Many "requirements" are current-state habits, not business mandates. Challenge them before requesting a workaround.

What is the lifecycle cost?

Model customization cost across the full contract, including upgrade risk, testing overhead, and vendor support implications.

Pitfall 7: Approving the License Price Instead of the Total Cost



License or subscription cost is typically less than a third of the real investment. Teams that build business cases around software price alone routinely discover that implementation, change, and support costs far exceed original projections

6 TCO CATEGORIES

Each needs a validated cost range, named owner, and confidence level

50% - COMMONLY UNDERESTIMATED

Implementation, data, and change costs routinely exceed the software alone

Software

Subscription or license fees, modules, and user tiers

Implementation

Partner fees, internal backfill, and project management capacity

Data

Cleansing, migration, validation, and governance effort

Integrations

Build, test, and ongoing maintenance for connected systems

Change

Training, communications, and adoption support across all roles

Support

Post-go-live optimization, hyper care, and ongoing enhancement

Model cost **ranges**, not single-point estimates. Require assumptions, owners, and confidence levels for each category.

Pitfall 8: Selecting the ERP but Under-Selecting the Implementation Partner

The platform determines what is **possible**. The partner determines whether it becomes **business value**. Two organizations running identical software can have dramatically different outcomes based on their partner's industry depth, methodology, and delivery team quality.

Partner Due Diligence Checklist

- ✓ Interview the **actual delivery team**
- ✓ Validate **methodology, accelerators**, and project governance approach
- ✓ Check **references** for your industry and deal scope
- ✓ Assess **change management**, training, and post-go-live support
- ✓ Confirm **data migration** experience and integration tooling

Partner Fit Dimensions

- ▶ **Industry and domain depth**
- ▶ **Process advisory capability**
- ▶ **Data migration track record**
- ▶ **Change enablement practice**
- ▶ **Long-term support model**

Bottom line: Score partners with the same rigor you apply to the software itself.

Pitfall 9: Treating Change Management as Training at the End

Adoption risk is a selection criterion, not a post-go-live problem. Systems that are functionally superior but difficult to use consistently underperform simpler alternatives that were designed with the end user in mind. The time to evaluate usability is before the contract



Score User Experience

Include role-based usability explicitly in demo scoring criteria. Poor UX is a risk multiplier across every process area.



Test Role-Based Workflows

Ask end users to complete core tasks during structured demos. Observe where friction occurs.



Identify Change Champions Early

Recruit influential process owners as change advocates during selection. Their buy-in shapes adoption outcomes.

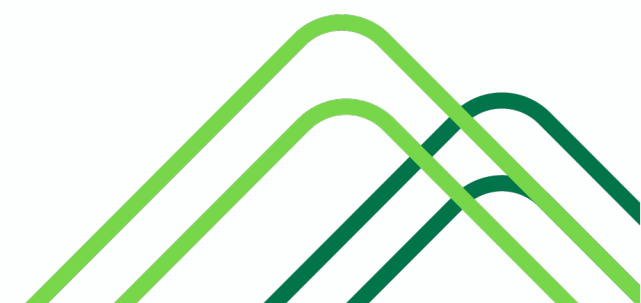


Select for usable workflows, not just functional depth.

Polling Question #3

Which factor is most likely to lead to "shiny object syndrome" during a software evaluation?

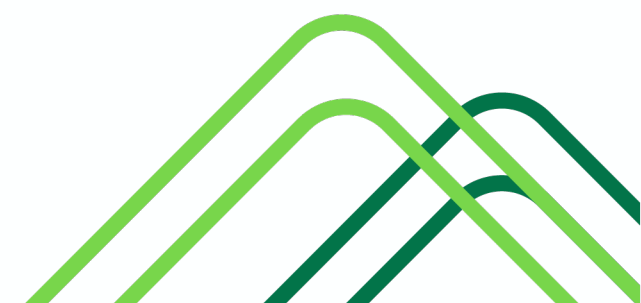
- A. Impressive product features
- B. Strong alignment with business requirements
- C. Documented business processes
- D. Structured scoring criteria



Polling Question #4

What is the biggest risk of neglecting change management during a technology implementation?

- A. Higher software licensing costs
- B. Delayed vendor responses
- C. Low user adoption and resistance to change
- D. Longer product demonstrations



Pitfall 10: Leaving Controls, Security, and Compliance to Implementation

Access design, segregation of duties, and approval workflows are dramatically easier (and cheaper!) to configure correctly before the contract is signed. Retrofitting controls into a live system is one of the most disruptive and expensive post-go-live activities an organization can face.

Selection Evidence to Request

- Role design examples aligned to your organizational structure
- Segregation of duties capability demonstrations
- Configurable approval workflow examples across financial processes
- Audit logging depth and reporting proof points
- Cybersecurity architecture and data protection documentation

Priority Control Areas

- Access and segregation of duties
- Approval and authorization workflows
- Audit trail and change logging
- Data residency and privacy controls

Request evidence at the RFP stage, not during implementation scoping.

The ERP Selection Playbook: Six Gates, One Disciplined Decision

A structured gate model ensures the team **builds evidence progressively** and earns the right to move forward at each stage. **Skipping gates** is where selection risk accumulates fastest.

1 GATE 1 Outcomes

Business outcomes defined and approved by executive sponsor

2 GATE 2 Requirements

Prioritized, process-based requirements signed off by functional owners

3 GATE 3 Vendor Fit

Scripted demos completed and scored with evidence on file

4 GATE 4 TCO

Full total cost of ownership validated with ranges and owners

5 GATE 5 Risk

Controls, compliance, data, and partner risk formally assessed

6 GATE 6 Decision

Steering committee approves final vendor with documented rationale

A Strong Scorecard Balances Fit, Risk, and Value


Weighting prevents the loudest voice or the shiniest demo from becoming the decision model. A balanced scorecard forces the team to evaluate each vendor against the same evidence-based criteria, with transparency on how the final score was derived.

Illustrative Scoring Weights

Criterion	Weight	Primary Evidence
Process fit	28%	Scripted demo scores
TCO & business case	20%	Validated cost model
Risk & controls	18%	Security and compliance docs
Data & integrations	18%	Integration map and data profile
User adoption	16%	UX testing and training model

Scorecard Discipline

- Weights must be agreed before demos begin
- Each criterion must reference specific, documented evidence
- Scores must be separated from contract negotiation
- Dissenting views should be recorded, not suppressed

 Weights reflect business priorities. Revisit them with your steering committee before finalizing.

A 90-Day Selection Sprint Can Create Decision Confidence

Time-boxing creates **urgency and discipline**, but speed cannot come at the cost of evidence. Every gate is earned, not skipped. The output is a defensible ERP decision with implementation-ready scope and an agreed transition path.

Days 1-15	Days 16-35	Days 36-55	Days 56-75	Days 76-90
Foundation Finalize outcomes, governance model, and prioritized requirements. Confirm steering committee composition and decision rights.	Market Issue RFI or RFP, shortlist two to three vendors, and complete data and integration profiling. Confirm TCO assumptions.	Evaluation Execute scripted demo scenarios. Score vendor fit on process, controls, usability, and TCO. Document evidence at each gate.	Validation Complete partner due diligence, finalize business case with full TCO ranges, and conduct reference checks for your industry scope.	Decision Present scorecard to steering committee. Resolve final trade-offs. Obtain formal approval with documented rationale and transition plan.

Outcome: A defensible ERP decision with implementation-ready scope and an agreed transition path.

Choose the ERP with Discipline — Then Implement with Confidence



According to Gartner, 70% of ERP projects do not achieve their desired outcome. Undergoing a robust selection project & contextualized requirements gathering process will allow organizations to move forward with a true project scope & final output in sight.



Outcomes Defined

Business value anchors every decision



Requirements Prioritized

Noise removed before vendor contact



Demos Scripted

Evidence replaces vendor theater



TCO Validated

Full cost picture approved before commitment



Governance Active

Decision rights clear from day one



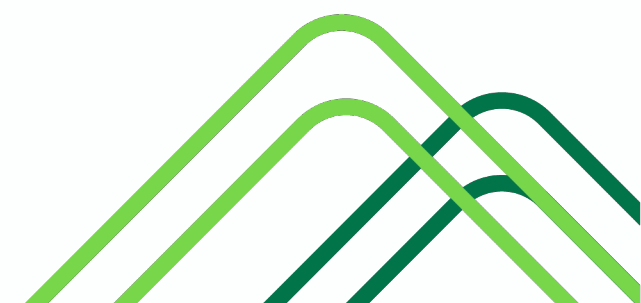
Adoption Planned

Change management starts at selection

Next step: Assess your selection readiness before vendor outreach begins. The time you invest now will determine the outcome you achieve at go-live.

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