

ERP Selection Framework

A weighted-requirements framework we've used across finance, manufacturing, and services clients. Adapt the weights to your context.

Step 1 — Anchor on outcomes, not features

- Start with 3 business outcomes you want in 18 months (not features in the ERP).
- For each outcome, name the KPI and who owns it.
- Everything downstream is justified against these outcomes.

Step 2 — Requirements matrix

- List functional requirements grouped by module (finance, ops, HR, CRM, etc.).
- Weight each: Must-have (5), Important (3), Nice-to-have (1), Ignore (0).
- Score each candidate ERP per requirement: Native (3), Configured (2), Customized (1), Not supported (0).
- Weighted total = weight x score. Rank candidates by total.

Step 3 — TCO over 5 years

- License / subscription costs (scale with users and years).
- Implementation cost (one-time).
- Hosting and infrastructure (including DR).
- Internal staffing (administrators, developers, trainers).
- Customization and integration work over time.
- Upgrade costs every 2–3 years.

Step 4 — Risk scorecard

- Vendor viability (years in market, financial health).
- Ecosystem size (partners, consultants, community modules).
- Lock-in risk (data portability, open standards, open-source availability).
- Localization: does the vendor support your countries and languages natively?

Step 5 — Proof of concept

- Pick your top 2 candidates after scoring.
- Build a time-boxed PoC for each on real data (not demo data).
- Define 3 acceptance scenarios up front. Measure objectively.
- Include end-users in PoC feedback sessions.

Need a facilitated selection process? We run 4-week selection engagements that land a defensible decision with a procurement-ready scorecard.

