



TECHNOLOGY  
MANAGEMENT  
CONCEPTS

# The 8 Must Ask Questions for ERP Selection (and Why)

The most important questions to choose the most  
suitable ERP Solution for your business



# The **Microsoft Dynamics** Product Line can be intimidating at first!



We've got your back and made the ERP Solutions environment a little more palatable.

With this **quick** and **easy** quiz you can narrow down the ERP systems that best fit your company's needs!

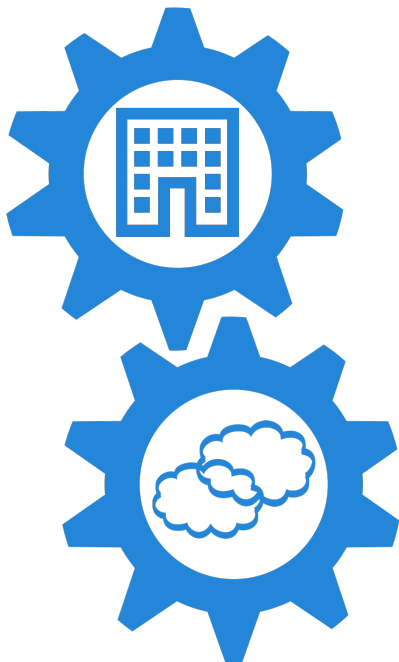


**Read on** to find out more on why each question is critical...

# Q1 Which industry best describes your company?

All companies have **common needs** and requirements for specific functions. For these needs (General Ledger, Accounts Payable, and such) any competent accounting system that can balance debits and credits will suffice. **Beyond** those common needs, however, the requirements will start to **vary wildly**. Functions that are a requirement in a manufacturing company are not needed at all by a professional services company.

Each ERP will **align better** with specific industries or 'verticals', allowing the ERP to meet a **high percentage** of needs and requirements for that industry, while its offerings to other industries will likely fall short. Knowing the industry for each company allows the process of selecting one or more potential ERP solutions to move quickly, narrowing the field to **relevant** ERP systems.



# Q2 Which deployment type are you interested in?

The decision on how to deploy your new ERP can be simple, or not so simple.

Some ERP systems are only offered as **"cloud"** solutions; just sign up for a subscription and off you go. Other ERP systems are **legacy** systems, only available on hardware that the company needs to own, manage and maintain.

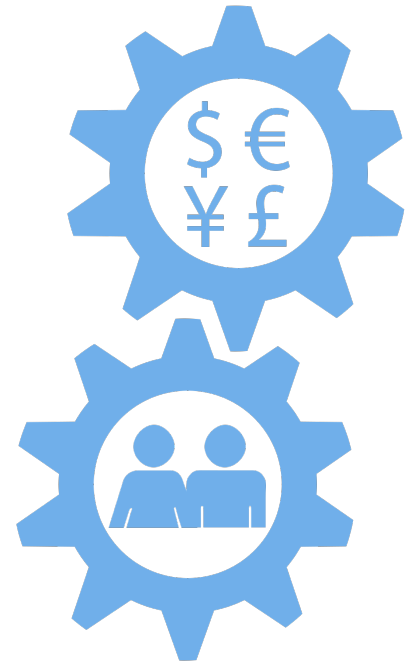
A rare few ERP systems offer a **true choice** in deployment options, so understanding the company's preference for the deployment method will also **narrow the range** of ERP systems to be considered.



### Q3 Are you replacing financials or implementing a full ERP system?

Accounting systems, as the name shows, are focused exclusively on balancing debits and credits, and producing reconciled financial statements. ERP systems offer a much **broader range** of sub-systems and functions in addition to all of the accounting ones, i.e. Human resources and Payroll, budgets and forecasts, CRM.

How **broad** is the vision for this project from the company's perspective? Will this be a surgical act in the Accounting department, or a wholesale re-ordering of the company?



### Q4 Will you be offering Employee Self-Service capabilities for Human Resources?

Choosing to implement an ERP system, including the Human Resources module(s), will also mean determining how the **employees** themselves will (or will not) **interact** with the system.

Functions such as updating personal information like addresses, adding new dependents (congratulations!), or adding or modifying benefits and deductions can be opened to the employee via a **web-portal**, or held as a **managed activity** within the HR department.





**Q5**

Will you be looking to implement a sales force automation system?

Accounting systems exist to record activities, typically as they occur or soon thereafter. ERP systems can be far more **pro-active** when **integrated** with a sales force automation system.

Using automation and workflows, analyzing historic activities and current balances, a sales force automation component can significantly improve the **productivity** of sales teams, generating higher customer satisfaction and loyalty, fewer errors (and apologies!), and more productive sales staff.

**Q6**

How many employees do you have at the location where you will implement the ERP solution?

ERP systems will typically offer user licenses with differing levels of **access**, for the Power User with full access to everything, to an Employee user, with very restricted access to their own personal records.

Some users can perform any and all tasks, while others have “read-only” access, running reports and inquiries but unable to interact with the system.

With the new ERP system, how much access will be granted and how deep that access will be are **critical** in understanding the range and breadth of the implementation effort for a new system.



## Q7

### Do you plan to implement your ERP solution in more than one country?

The needs of a multi-national company can be more challenging than that of a company that only operates domestically. The organizational structure, requirements for taxation and reporting, foreign exchange, etc. must be **accommodated** within the ERPs being considered.

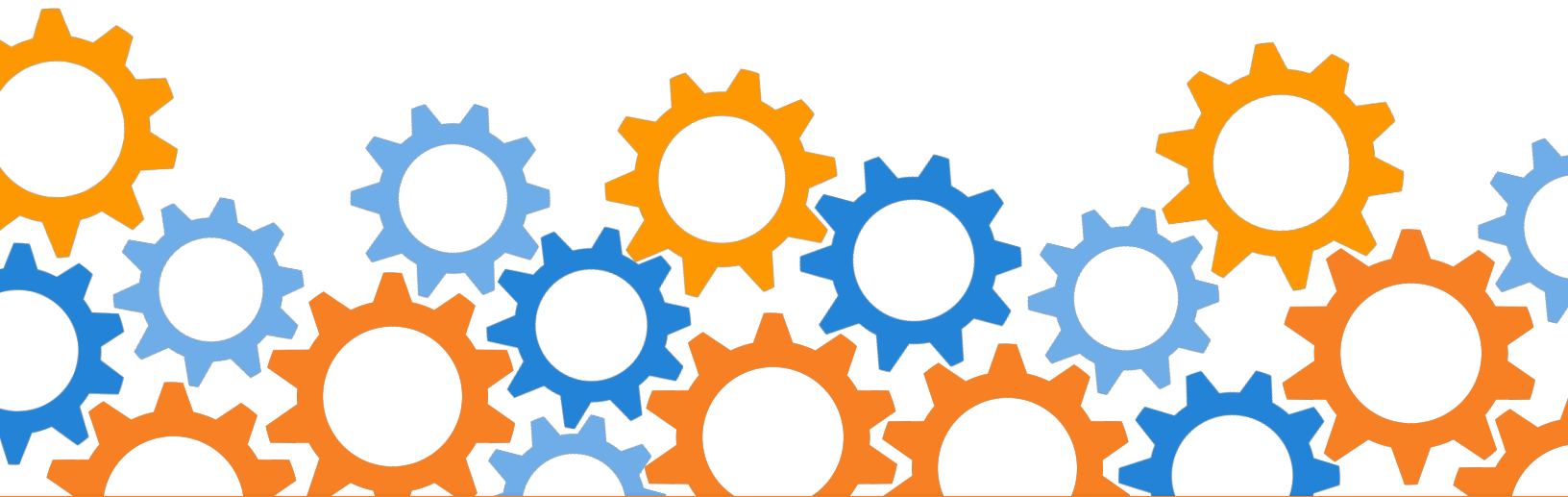
These features are not optional, they **must be present** for the company to operate, and not all ERPs can handle these needs.

## Q8

### How many total employees does your company have?

Knowing the **size** of the company, including the staff size, is very **useful** in determining the overall scope of the project, it's duration, and complexity.

- A **small** company, with a single location and a small employee base, may be well served with an **on-premise** solution, managing everything in-house.
- A **large**, multi-national company, with many locations and a very large employee base, may be best served with a **cloud** deployment and web-access for everyone.





Now that's over with ...

Match your **ANSWERS**  
to an **ERP SYSTEM**





Founded in 1984, TMC is a leading ERP software company and a Microsoft Gold-certified Partner. TMC has been implementing industry-leading ERP solutions including Microsoft Dynamics GP | NAV | CRM | SL and Dynamics 365.



**Technology Management Concepts**

807 Parkview Drive North, Suite 150

El Segundo, CA 90245

Phone: (310) 559-3982 | Fax: (310) 574-0802

[www.abouttmc.com](http://www.abouttmc.com) | [info@tmc-la.com](mailto:info@tmc-la.com)