



**ERP Readiness and System Selection
Virtual Readiness Workshop**

Instructors:

- Mike Mucha, Deputy Executive Director / Director, Research and Consulting, GFOA

Outline / Agenda – Week 1

Time	Training Material	Description	
1. Common ERP Mistakes - Assessing Organizational Readiness			
Objectives: <ul style="list-style-type: none"> • Understand what makes for a successful project and how to avoid common mistakes • Evaluate risks going into a project and assess organizational readiness 			
90 min	Presentation	<ul style="list-style-type: none"> • What is ERP? • What are keys to success for a project? • ERP Readiness Checklist • Project Governance • Project Goals 	
60 min	Exercise	<ul style="list-style-type: none"> • Defining the Project Vision 	Exercise 1

Time	Training Material	Description	
2. Process Improvement – Implementing Best Practices			
Objectives: <ul style="list-style-type: none"> • Lead process improvement efforts for your organization 			
90 min	Presentation	<ul style="list-style-type: none"> • Approach and Timing for Business Process Analysis • Lean Process Improvement Techniques • Process Mapping • Change Management 	
60 min	Exercise	<ul style="list-style-type: none"> • Process Mapping Workshop 	Exercise 2

Time	Training Material	Description	
3. Open Question and Answer / Vendor Market Discussion			
Objectives: <ul style="list-style-type: none"> • Learn how to develop an RFP that attracts competitive proposals and allows your evaluation team to differentiate vendor proposals 			
60 min	Discussion	<ul style="list-style-type: none"> • Discussion on current ERP market <ul style="list-style-type: none"> ○ Software vendors ○ Implementation • Open QA 	

Outline / Agenda – Week 2

Time	Training Material	Description	
4. Developing the RFP – Recruiting Your ERP System			
Objectives:			
<ul style="list-style-type: none"> Learn how to develop an RFP that attracts competitive proposals and allows your evaluation team to differentiate vendor proposals 			
90 min	Presentation	<ul style="list-style-type: none"> RFP Overview Developing Requirements Writing RFP Questions Evaluation Plan Approaches to Scoring Proposals Software Demos / Interviews 	
60 min	Exercise	<ul style="list-style-type: none"> ERP Evaluation Workshop 	Exercise 3

Time	Training Material	Description	
5. Transitioning to Implementation – Contracts, SOWs, and SLAs			
Objectives:			
<ul style="list-style-type: none"> Learn how to develop an RFP that attracts competitive proposals and allows your evaluation team to differentiate vendor proposals 			
75 min	Presentation	<ul style="list-style-type: none"> Discovery Contract Negotiations Statement of Work Service Level Agreements Preparing your Internal Teams Requirements Quality Assurance / Accountability 	
45 min	Exercise	<ul style="list-style-type: none"> Risk Mitigation Exercise 	Exercise 4
30 min	QA	<ul style="list-style-type: none"> QA on any topics 	QA