

Fast-Tracking an RFP and Selection for a New ERP System

The Challenge

A health organization in the Pacific Northwest partnered with Pivot Point Consulting to fast-track an Enterprise Resource Planning (ERP) RFP and selection to meet a mission critical timeline, improve business processes, and enable HR automation.

Our client had a homogenous set of aging applications to support Human Resources, Finance, and Supply Chain across the growing enterprise. They engaged Pivot Point Consulting to develop an ERP strategic vision and roadmap and utilize a disciplined methodology in the selection of a new ERP system... in a compressed timeline of just a little over 4 months.

Our Solution

Using as a basis our proven, unbiased System Selection methodology for ERP strategy, vendor due diligence and product selection, Pivot Point Consulting worked with the client to tailor a streamlined approach aligned with the aggressive timeline and still met the goals for the engagement to:




- develop a strategic plan and roadmap that supported enterprise needs, supported various sites and stakeholders' specific business goals and,
- Ensure the new system(s) and technology met current and future needs, enhanced the end-user experience, reduced technical complexity, and streamline processes.

Building on existing relationships and networks, Pivot Point Consulting proactively connected with ERP vendors to provide a "head's up" on the forthcoming fast-tracked RFP. Additionally, the project work was divided into two workstreams - one focused on Strategic Planning and the Roadmap, the other was

focused on the new ERP selection. Commitments to the timeline were made on all sides including Pivot Point Consulting, the vendors, and the client to expedite questions and turn around any information required for the work. Key milestones were kept front-and-center.

The Impact

The client accomplished numerous goals during their partnership with Pivot Point Consulting, including:

-  • Selecting new ERP system for the enterprise according to the schedule
-  • Positioning the client to meet their goals of having Core HR capabilities deployed prior to Benefits Open Enrollment
-  • All delivered on time and under budget!

Joe Clemons

Vice President of ERP, Pivot Point Consulting

"The most challenging part about this engagement was the timeline. We found success in achieving our client's goals by leveraging our existing methodology and adjusting it to accommodate their needs. Looking back, our relationships with the right vendor contacts was instrumental in making sure expectations were set up front and ultimately drove the on time and under budget delivery of the selection provided to the Center over the past 4 years."