

A photograph of three construction professionals—two men and one woman—wearing white hard hats and high-visibility yellow safety vests. They are standing in a bright, modern building under construction, looking at a tablet held by the woman in the center. The background shows large windows and structural elements of the building.

CHOOSING AN ERP

**THE EXECUTIVE'S GUIDE
TO A WINNING RFP**

A practical guide to selecting and implementing an ERP—the right way



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YOUR ERP ISN'T JUST SOFTWARE—IT'S THE OPERATING BACKBONE OF YOUR ORGANIZATION.

For executives, selecting the right ERP is one of the most critical decisions influencing financial visibility, operational efficiency and scalable growth. The success of that decision begins long before implementation. **It starts with a clear, strategic request for proposal (RFP).**

This guide simplifies that process. You'll learn how to blend executive-level strategy with practical requirements in an easy-to-use checklist to help you:

- **Align your leadership** team around clear business outcomes
- **Define the requirements** that matter most to your operations
- **Avoid common pitfalls** that derail ERP projects
- **Evaluate vendors** confidently and consistently
- **Ensure implementation success** from day one

Not quite to the RFP stage? Use this checklist as a planning tool to look for an ERP that fits the way you work today and how you'll grow in the future.



STEP 1

Secure executive alignment.

Before you define requirements for your RFP, define intent. The strongest RFPs begin with executive alignment around the business outcomes the ERP must achieve.

Why are you seeking a new ERP? What are your ERP “must-haves?” What ERP features or implementation factors will advance one vendor over another? Answer these questions beforehand, and build your questions around them.

Template Tips

Add the data you gather to the following sections of your RFP:

Introduction and background

- **Project purpose:** Explain why you’re looking for a new ERP system. Are you replacing an existing system or implementing an ERP for the first time?
- **Project goals:** Summarize your expected benefits (e.g., improved data accuracy, streamlined processes, scalability).



Checklist

- Clarify your primary business drivers for ERP replacement
- Document current challenges impacting visibility, accuracy or scalability
- Select an ERP consultant to guide you through the process with specialized expertise
- Establish measurable success criteria (e.g., time reduction, cost savings, etc.)
- Identify financial, operational and risk-related goals
- Confirm your executive sponsor and governance model



STEP 2

Identify internal stakeholders.

An ERP touches every part of your organization, and every business unit has different needs and pain points. That's why it must reflect the real workflow, data and user needs of your company. Fail to address these must-haves, and prepare for implementation failure.

Which business units will a new ERP impact most? What needs does your current ERP fail to address? Which processes are most in need of greater efficiency?

How to get the right input

Gathering the data you need starts with inviting the right people and asking the right questions.

1. Include representatives from all impacted departments and key roles with deep operational knowledge. Ensure their viewpoints are inclusive of both end user and manager opinions for a full picture of departmental needs.
2. Communicate the purpose and how a new ERP fits into the process in advance to allow for thoughtful preparation and stakeholder buy-in.
3. Ask open-ended questions like:
 - What are the biggest pain points or bottlenecks your team experiences with current systems?
 - Which tasks or workflows consume the most time or cause errors?
 - What compliance or regulatory requirements does your department need the ERP to support?
 - What integrations would significantly improve your team's efficiency?
 - Are there any upcoming changes (e.g., new projects or services) that the ERP must accommodate?
 - What training or support will your team need to successfully adopt a new ERP system?



Checklist

- Identify all functional areas impacted by a new ERP
- Document top workflows per department
- Capture pain points and inefficiencies within each business unit
- Prioritize immediate functionality needs versus future enhancements
- Assign owners for each group of requirements



STEP 3

Define must-have functionality.

Once you've identified stakeholder needs, the next critical step is to define and prioritize the must-have ERP functionality your organization needs to address them.

This is the heart of your RFP—a clear, prioritized checklist of what the system must deliver.

Template Tips

Add the data you gather to the following sections of your RFP:

Functional requirements

- List functional requirements organized by department. For example:
 - **Finance:** General ledger, accounts payable/receivable, budgeting, financial reporting
 - **Project management:** Change orders, subcontractor management, field data collection
 - **Procurement:** Materials management, vendor management, warehouse tracking
 - **HR:** Onboarding, time tracking, payroll



Checklist

- Specify detailed functional requirements by department
- Categorize each requirement as “must-have,” “nice-to-have” or “optional”
- Finalize the list that will form the core of the RFP functional requirements section



STEP 4

Avoid implementation hang-ups.

Even the most superior ERP won't succeed without the right implementation partner—the team who will guide you through configuration, data migration, training and support. Your RFP must set clear expectations for implementation methodology, timeline and ongoing service.

Template Tips

Consider adding implementation-specific questions to your RFP, like:

- How many ERP implementations have you completed for construction firms?
- What construction-specific challenges have you encountered, and how did you address them?
- How will you manage and communicate the project schedule and milestones?
- Who will you assess and mitigate risks during the project?
- What type of training do you provide for end users, project managers and executives?
- What experience do you have migrating data from legacy construction and accounting systems? How do you ensure data accuracy?
- Can you support integrations with our existing tools?
- What ongoing support options are available after go-live?
- How do you handle software updates or additional feature deployments?
- Can you provide a clear cost breakdown for implementation services?
- How flexible are your contracts regarding changes in scope or timeline?



Checklist

- Ask for a documented implementation methodology
- Request a sample timeline by phase
- Define expectations for data migration ownership
- Specify change management and training standards
- Require a vendor-provided user adoption plan
- Review customer references for similar organizations



STEP 5

Evaluate the vendor fully.

Your ERP vendor is not a one-time service provider. They're a long-term partner. That's why choosing the right ERP vendor goes beyond features and pricing. It's about trust, collaboration and shared success. A thorough evaluation helps you minimize risks, uncover potential challenges early and ensure the vendor's values, capabilities and long-term vision align with your own.

This section ensures you evaluate the vendor consistently and transparently—not only as an upstanding business, but a reliable ally.

Template Tips

Add the data you gather to the following sections of your RFP:

Vendor information

- Company history and size
- ERP products offered
- Market experience and references
- Financial stability





Checklist

- Ask for relevant industry experience
- Get clarity on licensing, pricing and any additional costs
- Evaluate support quality and escalation processes
- Assess UX intuitiveness and ease of onboarding
- Understand roadmap, release cadence and product vision



STEP 6

Clarify technology and security requirements

Ensuring your ERP system meets stringent technology and security requirements is non-negotiable in a world of rapidly evolving threats and regular incidents. Any gaps can expose your organization to serious risks, including data breaches, downtime and compliance violations.

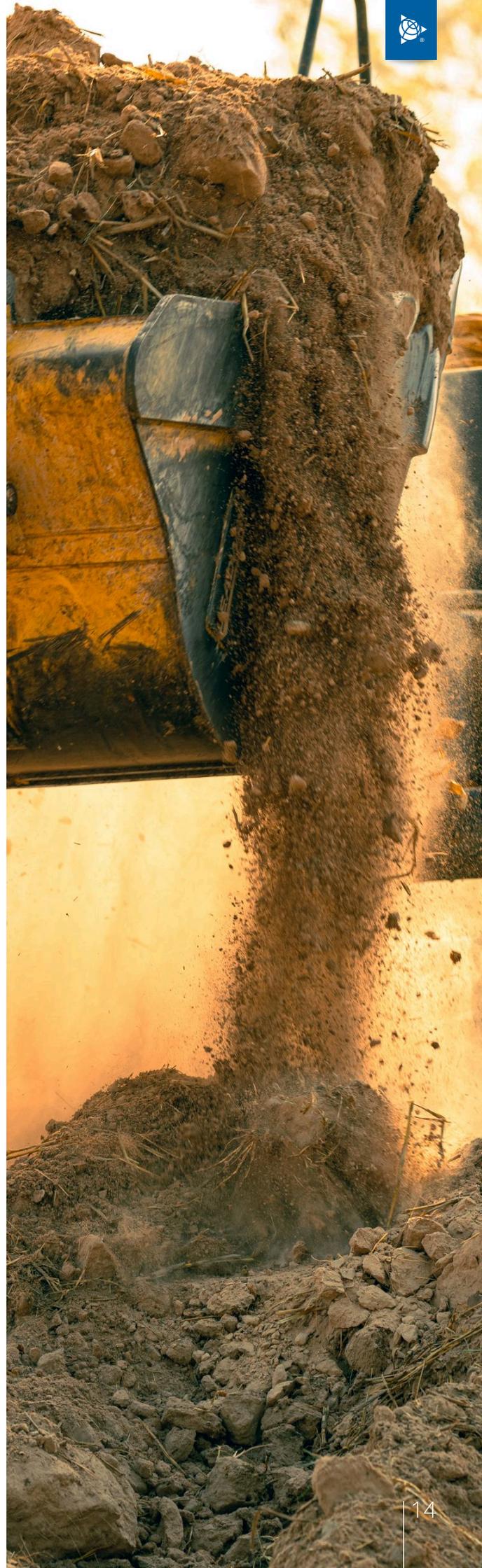
That's why it's important to understand your potential partner's security philosophy and set expectations up front.

Template Tips

Add the data you gather to the following sections of your RFP:

Technical requirements

- Platform details (cloud, on-premise, hybrid)
- Database preferences
- Compatibility with existing IT infrastructure
- Security and compliance standards
- Mobile access requirements





Checklist

- Confirm the vendor's hosting model and SLA terms
- List your required security protocols (MFA, SSO, encryption)
- Document your uptime/performance expectations
- Define your compliance and regulatory needs
- Ask for integration diagrams and API specs
- Validate backup and disaster recovery processes



STEP 7

Develop your scorecard

Every self-described ERP will sound good on paper. How will you compare vendors objectively to arrive at a final selection?

We recommend being transparent with potential vendors by listing the RFP categories you will prioritize most, as well as the weight each response will carry.

For example:

Criteria	Weight (%)
Qualifications and experience	10%
Project delivery and implementation approach	15%
ERP functionality	50%
Cost proposal	25%



CONCLUSION

Choosing an ERP is a major investment, and a well-executed RFP ensures that investment pays off. With clear requirements, aligned stakeholders and a consistent evaluation framework, you can avoid the pitfalls that derail ERP projects and select a system that drives meaningful business value.

If you're preparing for an ERP evaluation or want guidance tailoring this checklist to your organization, our team can help.

Reach out today to talk with an ERP expert.

[TALK TO AN EXPERT](#)