Functional Leader Orientation

Consortium Advancement & ERP Systems Evaluation & Selection

October 3, 2016
Session objective

Preparation for

• Your role
• Discovery visits
• Proposal reviews
• Demonstrations
The process

- Semi Finalists Selected
- Discovery Sessions
- Demos
- Feedback & Follow Up
- Revised Pricing
- Reference Checks
- Apples-to-Apples Comparison
- Selection
Get people on the bus
Proposal reviews: Focus on your functional areas

• **Review requirements**
  – Identify questions you have about how the work is done
  – Review responses to functional requirements and identify those that are of concern

• **Objective**
  – Ensure functional perspectives are addressed

• **Challenge**
  – New view; not old, personal processes
Discovery sessions: October 11-14

• Participate as scheduled
  – Your time to answer questions; not get your questions answered

• Objective
  – Provide important and clarifying information to the vendors to ensure effective demonstrations

• Challenge
  – Listening
  – Remembering you are thinking *consortium not college*
Proposal review

- Functional expertise review
  - New view; not old, personal processes
- Roadmap review with eye toward key functional improvements
- Implementation approach and plan
- Company philosophy
Demonstrations

• College ambassador to encourage full participation

• Attendance
  – Overview sessions
  – Implementation sessions
  – Your areas of expertise
  – Office hours (optional): Encourage those with questions to follow up

• Complete the feedback surveys for all vendors for whom you attend sessions
Demonstration schedule

- Oct. 24-25: ERP Vendor 1: St. Mike’s
- Oct. 25: Advancement Vendor 1: St. Mike’s
- Oct. 26: ERP Vendor 2: Champlain
- Oct. 27: ERP Vendor 2, Day 2: St. Mike’s
- Oct. 27: Advancement Vendor 2: Middlebury
- Oct. 31 & Nov. 1: ERP Vendor 3: Middlebury
- Nov. 1: Advancement Vendor 3: St. Mike’s
- Nov. 2: ERP Vendor 4: Champlain
- Nov. 3: ERP Vendor 4: St. Mike’s
After the demonstrations

- Complete all requests for feedback
- Coordinate with other functional leaders to formulate pros/cons of each vendor & its solution
- Collaborate with Selection Committee representatives
- Possibly participate in reference calls
Q&A