

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



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

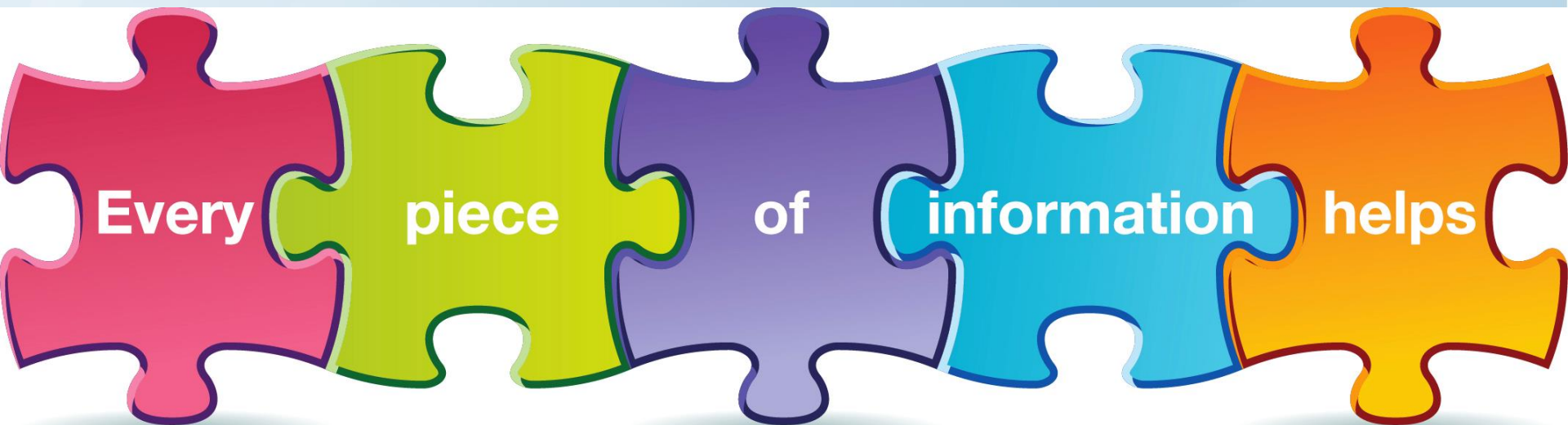
- College ambassador to encourage full participation
- Attendance
 - Overview sessions
 - Implementation sessions
 - Your areas of expertise
 - Office hours (optional): Encourage those with questions to follow up
- Complete the feedback surveys for all vendors for whom you attend sessions

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

