

### Software Selection – Savings over \$100k

Phoenix Group worked with an Ann Arbor based organization to help them select a new ERP system. The client was utilizing QuickBooks and it had been a very useful tool for them for many years. However, the organization had doubled in size for three consecutive years and it became clear that QuickBooks would not be a tool for further growth but, rather, a hinder.

Our client engaged Phoenix Group to help them assess and select a new ERP that would be able to scale as they continued to grow. The client formed an internal Task Force to be the key people during the engagement.

The Phoenix Group assisted the client in developing very clear needs including functional, technical and vendor requirements. The Phoenix Group performed a market survey to identify which products merited further investigation and created a short list of contenders. The Phoenix Group's contract expert then developed a solid RFP which was distributed to the short list of vendors.

We believe it is important to create and maintain a competitive environment once an RFP has been issued. The Phoenix Group hosted a bidders' conference which allowed critical Q & A time prior to the submission of a proposal. Another key element is the demonstration. The Phoenix Group prepared a very customized presentation package for each vendor still in the process. Real time scoring allowed both client and vendor immediate feedback.

At this point, The Phoenix Group negotiated with the vendor(s) of choice. The purpose of these negotiations was to secure the very best pricing on the software, the implementation partner and the necessary ongoing support. These critical negotiations also served as a means of shifting the risk appropriately and conducting due diligence on the potential implementation partner.

The Phoenix Group prepared a presentation for management. The client then signed the respective contract and statement of work.

By engaging The Phoenix Group this client reported savings of \$110,000 due to savings in software cost, monthly fees, implementation and support costs.

