

Request for Proposal Template for Enterprise Resource Planning Acquisition

Use this template to ensure that your RFP for ERP includes all the elements vendors need to develop a complete response—and that you get all the information you need to thoroughly evaluate ERP vendor responses, side by side, against structured criteria.

Section	What to Include	Points to Consider
Background Information	An overview of your organization and its business, including the number of employees, future goals, and how the ERP should support those goals.	<ul style="list-style-type: none"> • Be brief but comprehensive. • Company background should give vendors context to better understand how you'll use their ERP and, thus, the approaches they should offer.
Project Scope	<ul style="list-style-type: none"> • A breakdown of the specific duties the ERP vendor is expected to fulfill. • Project timeline and important milestones. • A detailed list of subcontractor responsibilities, if applicable. 	In addition to concrete project requirements (e.g., the implementation of four named ERP modules by a specific date), describe change management needs. ERP vendors commonly work with companies to train employees on how to use the new software to its full potential.
Requirements List	<ul style="list-style-type: none"> • Business functions the ERP system must support. Common functions include: <ul style="list-style-type: none"> ◦ Accounting and Finance ◦ HR ◦ Manufacturing and Distribution ◦ Materials Management ◦ Inventory and Order Management ◦ Supply Chain Management ◦ Customer Relationship Management ◦ Business Intelligence and Reporting ◦ Marketing • Required integrations with existing IT solutions. • Preferred deployment model (cloud or on-premises). • Training requirements. • Customizations to suit specific business needs, if applicable. • Data compliance and security requirements. • Implementation timeline. 	<ul style="list-style-type: none"> • Weighting requirements will help vendors better understand your top priorities. • Differentiate between short-, medium-, and long-term project goals. • Describe usability objectives as well as functional capabilities, since the success of new ERP solutions ultimately hinges on whether employees can use it easily enough.



<p>Vendor Qualifications and Past Performance</p>	<ul style="list-style-type: none"> • Information request for vendors to provide: <ul style="list-style-type: none"> ◦ Their expertise in your industry, including previous customer engagements. ◦ Relevant awards. ◦ Customer references. ◦ Previous project challenges/failures. • Name any implementation partners you plan to use and ask for any the vendor may bring to the table. 	<ul style="list-style-type: none"> • Don't underestimate the value that customer references and insight into past challenges/failures can provide when evaluating vendors. Pursue references diligently. • Do additional independent research to complement your RFP responses.
<p>Budget and Pricing</p>	<ul style="list-style-type: none"> • Information request on the total cost of the project, broken down yearly over a 3- to 5-year period. • A breakdown of upfront versus ongoing subscription costs (for cloud-based ERP solutions). • Any update and maintenance costs. • Consulting costs, if you require the vendor to help manage the ERP solution on an ongoing basis. • Employee training costs. • Cost flexibility requirements, especially in the event of a change in project scope. 	<p>Think through the differing accounting implications of on-premises versus cloud-based delivery models. If appropriate, consult with your company's finance department.</p>
<p>Evaluation and Award Process</p>	<ul style="list-style-type: none"> • Describe the process you plan to use to evaluate RFPs. • List anticipated follow-ups, such as live product demonstrations. • Evaluation timeline. 	<ul style="list-style-type: none"> • Plan to issue an award letter or letter of understanding (LOU) to the winner. • Issue a rejection letter to unsuccessful vendors in recognition of their efforts and to maintain healthy relationships.
<p>Contacts</p>	<ul style="list-style-type: none"> • Company IT leader responsible for the overall ERP implementation. • Other ERP and IT decision-makers with a stake in the project. • Third-party consultants and implementation partners. 	<p>Provide contacts that have a vested interest in the ERP implementation and the bandwidth to answer vendors' questions throughout the RFP process.</p>

