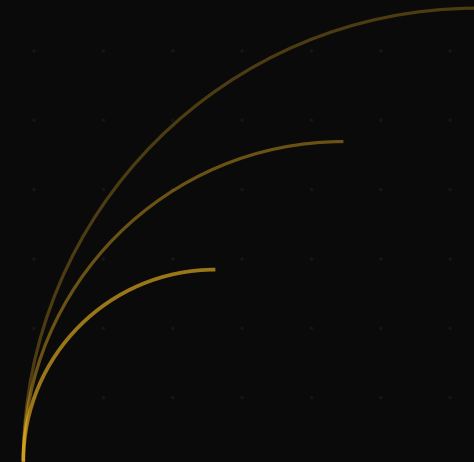


ERP BUYERS - FINANCE, OPERATIONS, IT

# How to evaluate an ERP vendor and proposal

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ERP evaluation for buyers: data migration, cutover risk, customisation as a change-order vector, licence true-ups, environments, and named staffing.



## WHAT'S INSIDE

## 5 steps in this guide

- 01 Data migration is the overrun engine
- 02 Cutover and hypercare
- 03 Customisation is a future liability
- 04 Licence true-ups
- 05 Named staffing

*ERP implementations are the single most common cause of budget overruns, and the pattern is predictable: the costs that blow the budget are the ones excluded from the fixed-fee proposal.*

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**01**

## **Data migration is the overrun engine**

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Vendors routinely exclude data cleansing, legacy extraction tooling, and cutover validation from fixed-fee proposals. Demand a data-migration workplan with defined record counts, transformation rules, and UAT criteria before contracting - and a rollback plan for cutover.

**02**

## **Cutover and hypercare**

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A compressed cutover window (under 48 hours) is a critical risk signal; most ERP go-lives need 72-96 hours of hypercare. Get the hypercare period, staffing level, and a named senior lead into the contract.

**03**

## **Customisation is a future liability**

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Every customisation to a standard ERP is an upgrade liability and a change-order vector. Require a customisation register before contracting; any customisation costing more than ~15% of licence value should require executive sign-off.

**04**

## **Licence true-ups**

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ERP licence metrics are complex - named vs concurrent users, module activation, user-count true-ups. These are routine sources of unexpected cost post-go-live. Cap renewal increases and clarify the metering in writing.

## 05

### **Named staffing**

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The consultants presented in the sales process are almost never the ones assigned. Contractually require named key personnel with CV sign-off and penalties for unilateral substitution.

**PUT THIS TO WORK**

# Walk into every evaluation with the vendor's own playbook.

- A vendor-proof scope, issued before any proposal
- Gap analysis scoring every proposal against your scope
- A risk-weighted interrogation kit for the vendor meeting
- Scope-drift detection across proposal versions

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