



# ERP RFP cheat sheet: Build a strong foundation for ERP success



A quick-reference guide to crafting a smart ERP Request for Proposal (RFP)

## What are the benefits of creating an RFP for your ERP?

- ▶ **Clarifies your needs:** Define priorities, pain points, and key requirements across your organization.
- ▶ **Aligns stakeholders:** Ensures buy-in from all departments impacted by the ERP implementation.
- ▶ **Saves time & money:** Prevents investing in a solution that doesn't fit your needs.
- ▶ **Improves vendor comparisons:** Standardizes the selection process with apples-to-apples evaluation criteria.
- ▶ **Streamlines implementation:** Sets expectations early to reduce scope creep and miscommunication later.



# Key components of a successful ERP RFP

Section	What to include
Executive Summary	A high-level overview of your organization, why you're seeking a new ERP, and what goals you hope to achieve.
Company Background	Industry, locations, number of employees, existing systems, and high-level challenges.
Project Goals	Your top objectives (e.g., reduce manual work, increase visibility, improve integration).
Functional Requirements	A detailed list of must-have features, typically grouped by modules (Finance, CRM, Inventory, etc.).
Technical Requirements	Consider deployment model (cloud/on-prem), scalability, mobile access, integration capabilities, security, and system performance.
Implementation Timeline	Desired start and go-live dates, project phases, and key milestones.
Support & Training	Expectations for onboarding, end-user training, technical support, and documentation.
Budget & Pricing Info	Whether you're requesting fixed pricing, licensing models, or ongoing support costs.
Vendor Information	Ask for company history, experience in your industry, customer references, and key differentiators.
Proposal Instructions	Timeline for submissions, evaluation criteria, points of contact, and formatting guidelines.

## Tips for a more effective ERP RFP

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**Engage internal teams:** Get input from finance, operations, IT, and end users.
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**Prioritize requirements:** Mark features as "Must Have," "Nice to Have," or "Optional."
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**Use use-cases:** Include real scenarios your teams face to help vendors demonstrate fit.
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**Be transparent:** Share challenges and expectations to foster realistic proposals.
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**Evaluate holistically:** Look beyond price—consider functionality, vendor support, and long-term value.



Download this chart, share it with your team, and use it as a starting point to build a smarter, faster ERP selection process.