



ACCOUNTABILITY INSIGHTS

ERP Vendor Selection Checklist

A practical, five-step framework for evaluating and selecting an ERP partner

PREPARED BY ACCOUNTABILITY • ERP IMPLEMENTATION SPECIALISTS

How to Use This Checklist

Work through the five sections below with your leadership team and portfolio company stakeholders before you engage ERP vendors.

Use Executive Tips to guide strategic conversations and revisit the Common Mistake callout on the final page before you commit to a vendor.

WHAT'S INSIDE

1**Business Goals**

Clarify what you are solving for before you shop.

2**Solution Fit**

Map ERP capabilities to your real operational needs.

3**Vendor Evaluation**

Vet the company behind the demo, not just the demo.

4**Implementation Partner**

The team executing the project matters as much as the software.

5**Final Decision**

Confirm alignment and cost before you sign.

Ready to talk through your ERP strategy? [Schedule Your Free ERP Assessment at erpforprivateequity.com](https://erpforprivateequity.com) or contact Randy Roper at 210-219-7243

STEP 1

Business Goals

Before evaluating software make sure your business objectives are clearly defined.

- ☐ Define your top 3 business objectives – what business problems you want to solve
- ☐ Identify current ERP pain points
- ☐ Establish project budget and timeline
- ☐ Identify key stakeholders and decision-makers
- ☐ Identify all departments that will be affected
- ☐ Align goals with your investment thesis and hold-period timeline
- ☐ Define what success looks like one year after implementation

✓ **EXECUTIVE TIP**

Clearly defining your business goals before evaluating ERP vendors keeps the project focused on business outcomes rather than software features.

STEP 2

Solution Fit

Evaluate whether the ERP Solution meets operational and financial requirements.

- ☐ Financial Management
- ☐ Inventory & Warehouse
- ☐ CRM & Sales
- ☐ Reporting & Dashboards real - time
- ☐ Workflow Automation
- ☐ AI Capabilities
- ☐ Multi-Entity & Consolidation Support
- ☐ Industry-Specific Functionality
- ☐ Scale as your business grows
- ☐ Software cloud-based with regular updates
- ☐ Workflow Automation
- ☐ Strong security & Compliance capabilities
- ☐ Reduce manual work & improve operational efficiency

✓ **EXECUTIVE TIP**

Prioritize the capabilities your organization truly needs today while ensuring the ERP can scale as your business grows.

STEP 3

Vendor Evaluation

Selecting the right ERP software vendor is just as important as selecting the software itself.

- ☐ Industry experience
- ☐ Customer references
- ☐ Implementation methodology
- ☐ Customer support & training resources
- ☐ Active customer community & knowledge base
- ☐ Product roadmap – do they invest in innovation & product development
- ☐ Financial stability and long-term viability
- ☐ Is there hidden licensing or upgrade costs

✓ **EXECUTIVE TIP**

Look beyond software functionality. A vendor's long-term product vision, customer satisfaction, and commitment to innovation are equally important.

STEP 4

Implementation Partner

Your implementation partner often determines the success or failure of your ERP project

- ☐ Dedicated Project Manager
- ☐ Discovery Workshop
- ☐ Data Migration Plan
- ☐ Change Management
- ☐ Go-Live Support
- ☐ Post Go-Live Support
- ☐ PE / M&A experience (carve-outs, add-ons, integrations)
- ☐ Will they become a long-term strategic advisor, not just an implementation resource

✓ EXECUTIVE TIP

The discovery phase is the foundation of a successful implementation. Choose a partner that listens, asks thoughtful questions, understands your business processes, and recommends solutions based on your goals — not a one-size-fits-all approach.

STEP 5

Final Decision

Before signing an agreement, make sure you've completed this final review

- ☐ Have you compared all shortlisted ERP solutions objectively?
- ☐ Have we spoken to customer references?
- ☐ Have we reviewed complete project timeline?
- ☐ Review total cost of implementation costs
- ☐ Identified potential project risks
- ☐ Understand the expected ROI
- ☐ Does leadership support the final recommendation?
- ☐ Are you confident in both ERP Solution and Implementation Partner?
- ☐ Define KPIs
- ☐ Are we ready to move forward?

✓ EXECUTIVE TIP

Select the partner you trust to support your organization for years after go-live, not simply the one with the lowest proposal.

A Note From Our Founder

Thank you for downloading the AccountAbility ERP Vendor Selection Checklist.

Choosing the right ERP partner is one of the most consequential decisions you will make during your hold period. Get it right, and it becomes a growth engine for every add-on acquisition and every exit conversation. Get it wrong, and it becomes a drag on both.

We built this checklist from real experience guiding private equity portfolio company implementations. I hope it brings clarity and confidence to your evaluation process. If you would like a second set of eyes on your ERP strategy, our team is always happy to help.

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COMMON MISTAKE

Don't compare ERP vendors before documenting your own business requirements.

Otherwise, you'll buy the best demonstration instead of the best solution.

Red Flags

- Promises unusually short implementation timelines w/out understanding your business
- Provides generic demonstrations instead of industry-specific examples
- Has no post-go-live support plan
- Assigns junior consultants after the sale
- Cannot provide recent customer references

Ready for a deeper conversation?

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