

Case study: User Requirements for ERP RFQ

Client: "Better-For-You" Snack Maker
 Project: Project Management / Design Scope

Background

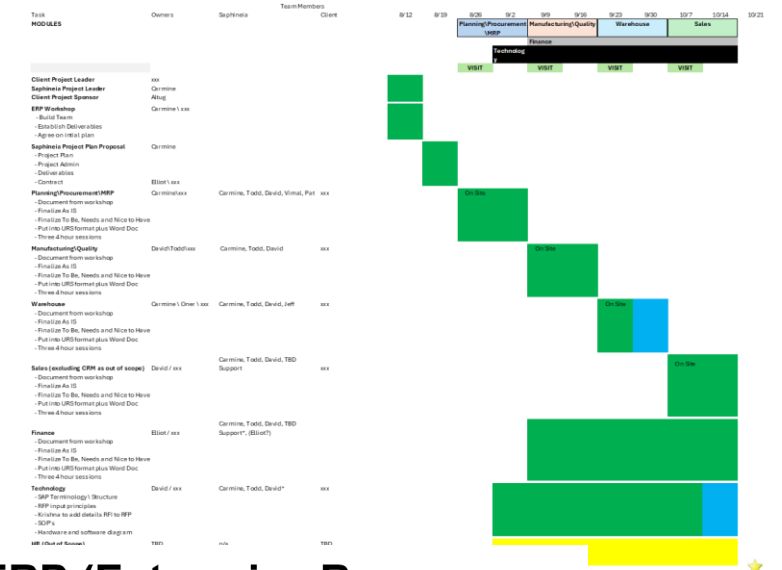
- Rapidly growing "better-for-you" snack maker planned to issue a Request for Quotation (RFQ) for a new ERP system as the business had outgrown its internally created systems.
- Saphineia was hired to add its operating expertise to this technology project with two deliverables:
 - Create a User Requirements Specification (URS) to support an ERP RFQ
 - Review operational practices and procedures to identify current gaps versus best practices with particular emphasis on activities that would impact an ERP implementation

Activities

- Established cross-functional project team, project charter and project management framework
- Conducted interviews with all functions to identify pain points followed by cross-functional problem-solving sessions that 1) created awareness & clarified the issues, including long-standing interdepartmental challenges; 2) identified root causes; and 3) created a platform for collaborative problem solving,
- Reviewed the client's operational systems and technical practices to document 'as-is' current state and 'to-be' future state, while providing practical solutions to operating challenges and suggestions for upgrades to current practices

Results & Benefits

- ✓ Provided project management oversight to efficiently and effectively bring all the URS inputs together to meet the ERP RFQ deliverables and timetable
- ✓ Created positive atmosphere among the company participants and Saphineia to bring out the best ideas in a collaborative environment
- ✓ Identified clear and actionable operational process improvement steps, including those that should be completed prior to an ERP implementation to avoid future costly mistakes
- ✓ Delivered the URS and ERP RFQ framework on-time and on-budget



ERP (Enterprise Resource Planning) URS Document

Competitive ERP selection process open for bidding from 10/28/2024 to 11/05/2024

Project Relevant Information

Revision #1
 Date of Revision: October 23, 2024

Approvals

Table 1: Approval Table

Name	Function	Date of Approval	Signature
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