

ERP selection & strategic business case



CHALLENGE

Exent's client had experienced very strong organic growth that had taken them to the edge of their legacy system capabilities. They identified multiple areas of the business that were struggling to deliver quality service to internal and external customers at scale, inefficiencies in managing process, challenges in reporting effectively on operations, and difficulties in adequately managing risk.

In a geographically broad business with offerings in Home Care, Residential Aged Care, and Retirement Living there were known impacts on processes spanning Finance, Human Resources, Learning & Talent, Projects, Procurement and Supply Chain, Asset Management and Business Intelligence.

Exent, under the sponsorship of the Chief Financial Officer, was engaged to produce a technology modernisation and replacement strategy informed by evaluating high-fit, cloud-based solutions across the broad scope areas above. This engagement would also define a strategic benefits case that articulated the internal staffing efficiencies, revenue enablement at scale, and operational improvements that would ensure the organisation could continue to scale up.

APPROACH

Exent executed the firm's proprietary methodology for an accelerated ERP sourcing and selection exercise spanning target state design, shortlisting and market engagement, conducting an RFX, evaluation and award, detailed implementation and solution planning, benefits and business case development, and final governance approval.

Exent was able to accelerate and de-risk a broad and complex technology selection in three ways:

1. Strong pre-built market intelligence on high-fit solutions, enabling a qualified shortlist from the outset
2. Predefined target state design that reflected better business practice, linked to strategic benefits
3. Accelerated processes for engaging, evaluating and negotiating with vendors driving much better business and commercial outcomes

The client and Exent had to jointly address challenges including a complex technology environment with proprietary inhouse systems, low levels of integration between applications, and historic technology underspend. Exent took a strategic approach focused on business outcomes by building a business-centric view of what the client's target state would look like in terms of better business practice, eg. End-to-end payables automation, reduced manual reporting, highly efficient customer onboarding, accelerated recruitment, etc.

Leveraging the firm's deep experience in the complex technology selection across multiple industries, Exent applied a four-phase approach to this engagement.

Phase 1 was Target State design of the business where the firm and client jointly explored and defined the strategic objectives of the business to identify the primary objectives and focus areas, before proceeding to define the functional scope of the technology solution. Exent's experience in process excellence assisted in defining strong future business outcomes and not simply selecting an ERP based upon current state requirements, or being overly technology-led. Our approach built blended teams to co-design, with strong stakeholder and customer engagement around key functional and technical aspects.

“Exent and our client jointly defined a broad set of functional capabilities across multiple main pillars, reflecting a complex scope for core ERP technology modernisation.”

Phase 2 was the Product and Partner selection process where the firm guided the business and vendors through a process at pace - balancing probity, quality, and competitive tension. We executed an RFX process with a targeted shortlist informed by deep market intelligence, and applied a robust quantitative and qualitative framework for evaluation that took out the guesswork, ensured quality outcomes and gave the executive and board assurance on an independent process.

Phase 3 then moved to detailed solution implementation planning for our awarded vendors. Exent's deep experience in system implementation informed our negotiations around common pitfall areas helping to remove budget line item uncertainty, inform a true resource view, and assure the board on the investment required. Exent and key client stakeholders worked closely with the vendors to build a detailed and achievable implementation plan with appropriate risk management built in, often uncovering and solving gaps in vendor data points and insufficient detail. During this detailed planning Exent formed and validated the strategic business benefits and ensured scope is aligned to meet them.

Phase 4 was the final business case development and board approval process where the firm developed a comprehensive benefits model and investment case fully defining programme scope, objectives, implementation costs, resources, benefits, options and risks. Exent brought clear communication and engagement to ensure real alignment around the business case and ownership of outcomes by key executives, and the firm was invited to present the business case to the board and various approval forums in recognition of the comprehensive work delivered in the process.

Global enterprise functions

Enterprise performance management — planning, budgeting & modelling

Enterprise business intelligence

Finance BI

Financials

- Core finance GL + AP + AR
- Fixed assets
- Digital A/P + A/R
- Banking & cash
- Treasury & risk
- Budget management
- Consolidation
- Project accounting
- Cost accounting & economic modelling
- Tax
- Finance governance, risk & compliance
- Travel & expense

HCM & payroll BI

Human capital

- Employee hire to retire
- eRecruitment
- Learning & development + LMS
- Talent management
- Performance & incentives
- Workforce management
- Occupational health & safety
- Self-service
- Payroll**
- Time & attendance
- Pay processing
- Awards & entitlements

Asset intensive BI

Capital works

- Project & portfolio management
- Portfolio budgeting & forecasting
- Project management
- Contract management
- Maintenance**
- Preventative management
- Equipment & asset maintenance
- Work order management
- Scheduling & resourcing
- Vendor & contract management
- Overall equipment effectiveness

Manufacturing & engineering BI

Manufacturing

- Engineer to order
- Make to order
- Batch manufacturing
- Process manufacturing
- Scheduling & planning
- Shopfloor work management
- Product costing
- Engineering**
- Asset design
- Project delivery
- Commissioning

Supply chain BI

Supply chain

- Engineer to order
- Inventory replenishment
- Sourcing & vendor qualification
- Procurement/purchasing
- Vendor performance & risk management
- Contract management
- Warehousing
- Distribution & logistics
- Product data management
- Client specific**
- Grants & subsidies
- Lease management

Marketing & sales BI

Supply chain

- Digital & web content management
- Marketing automation
- Campaign automation
- CRM & lead management
- Sales & service**
- Quote to sales order
- Bill to collect
- CRM & sales process automation
- Service/case management
- Field service management
- eCommerce

Platform

- Identity & access management
- Master data management
- Office suite integration
- Forms, workflow & rules
- Portals & self-service
- Mobile accessibility
- Events, notification & collaboration
- Data extract, transform & load
- Extensibility & personalisation
- Integration
- Business process lifecycle management
- Document management**
- Electronic content management
- Document version control
- Office & desktop file integration
- Sharing & collaboration

OUTCOMES

Exent delivered a transformational business case that allowed the client to solve long-standing operational and customer challenges, also achieving broad technology modernisation including moving to cloud and reducing IT complexity and cost.

Exent's better practice frameworks gave real clarity and definition to specific business efficiencies, customer experience improvements and process uplift that yielded multi-million dollar returns and a range of payback periods from 3 years to 7 years across a well-defined programme of work.

The programme delivered detailed architectural impacts of the future technology platforms and how they would integrate and align with existing Community Care platforms, with actionable detail around functional designs, interfaces and master data management.

This comprehensive digital transformation plan and business case was approved by the board on its first presentation and was recognised for its transformation of Human Resources, Payroll, Finance, Asset Management, Supply Chain, and Business Intelligence across the organisation.

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