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ERP Demo Guide & Scorecard

Learn how to master your ERP demos

- ERP demo scorecard to assess and evaluate your vendor demos
- Building an ERP team demo
- How to evaluate ERP vendor demos

Template demo scorecard

Use this ERP demo scorecard during your vendor demos to quantitatively assess how well the software meets your requirements.

Your name

Date of demonstration

Name of ERP system shown

Name(s) of presenters

SCORE SHEET

Rank each feature from 1 to 5 on how well it meets your requirements in that area, according to this scale:

- 1. Is completely ineffective to meet this requirement
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01

Before the ERP demo

Learning the basics

Your company is shopping for a new ERP system. Whether this is your first one or a replacement system, we all start with online research these days. By now, your searches have already given you the first kind of ERP demos available from many vendors – the video presentation.

Video demos

These are quick to watch and might provide some insight to the utility of that ERP to your business. While you can see the user screen layouts, you can only get a brief glimpse into the workings of the system. Remember, these are effectively advertising designed to show you what the ERP provider thinks are their strong points while glossing over or omitting the weak points and areas where their ERP can't compete with others.

Watch a few of these for promising-looking vendors, then sit down with your team and compare notes. There is a chance that a video demonstration might persuade you to shortlist a system, but these shouldn't be used to make a final purchase decision.

Self-run demos

Some ERP vendors offer these, but not all. Self-run ERP demos provide you with a user ID, password and an opportunity to run your

own demo. Many of these are excellent tools to help you toward a choice. Many others are quite limited with only a few part numbers to use for testing purchase orders or sales fulfillment.

Even so, if they meet your key selection criteria well, this type of demo could help make your selection. Consider following up a promising self-run demo with a traditional person-to-person demo to get the best idea of what a system can offer.

Traditional vendor-led demos

These are still the best choice to really get into an ERP. Sometimes the sales representative will visit your site and log into their ERP. Their demo database will have every module, bell and whistle they offer available to see. Another popular method is for a demonstration specialist to lead the performance using a web presentation. Either method will provide an excellent demonstration for you and your company.

Now the onus falls on you to control the demonstration. The demonstrator will show their software's best features and avoid the shakier aspects of their ERP that don't quite meet your requirements. Retrieve your list of key requirements and ensure you question demonstrators on them thoroughly.

The ERP providers you selected will have a preset script for their demonstrations. They might be reluctant to admit it or share it with

you, but insist. They conduct demos for a living and their livelihood depends on making sales – their demo will be planned to make the best impression. Get the script in advance and make sure your key requirements are covered with adequate time allowed. Do the same with your 'nice but not essential' requirements list, then eliminate any other features from the demonstration.

Now that your demonstration script is set, let the demonstrator take the helm and show off what they have. Sit back and take notes.

Assembling your demo team

Who should be involved in your ERP demo team? The more, the merrier...but be sure to have a list of those who absolutely must attend and an alternate if required. Your entire organization won't be able to make it, but make sure everyone's needs are represented.

Be sure that your core demo team has some method to share what happened at the demonstrations with those who cannot attend, such as reports, access to demo notes or live recordings. There's only so many people that can fit into your meeting rooms, but that shouldn't stop you involving the wider enterprise in the process too.

Executive level

Your executive sponsor should certainly be on hand for any demos. They need to evaluate whether people across the entire business will get what they need with a new ERP purchase. Invite everyone on mahogany row, and even consider a special demo for them. C-level might not want to know the inner workings of the ERP system or how to complete a transaction, but they all will depend on data and information from the ERP to make better business decisions.

Managers and directors

In an ideal world members of this group should be able to perform all the day-to-day tasks assigned to team members at the next

level. Realistically, these might also be the hardest to attract to the demo. Put your salesman hat on and invite them anyway (offering free refreshments at demos will no doubt help in this area), and give them the chance to support their teams.

Everyday users

This group includes staff in accounting and purchasing as well as those in shop floor and logistics. Their daily lives will be most impacted by any ERP. There are a lot of people in this group so consider inviting team leaders and those who are seen as the next generation of leaders to the demo. Look for people who are smart and quick learners to act as 'superusers'. These people can then train everyone else and be cheerleaders for the system further on down the line during implementation.

Engineers and technical staff

This group is important even though many think they are not ERP system users. The designs, bills of materials, and other work they put out needs to be communicated with the rest of the company, and ERP is a communication system at its core. If the ERP you are considering has PDM or PLM, ensure that they have a voice on the ERP demo team.

Sales and customer support

Will the new ERP help deliver orders faster and more on time? Can it provide automatic communications with customers including expected delivery status and tracking numbers? Do you think they will want to see how well this works and what they will need to do? Of course!

What not to do

The worst ERP demo team is one that includes only those few who actively champion a new ERP system. Too often this group does not communicate well and assumes everyone else will like their choice. Get together as diverse a team as is feasible and be sure to listen to what they have to say before, during and after the demonstrations.

Planning for vendor demos

Before that friendly salesperson from your favorite ERP provider shows up for their demo, you need to be prepared. Here a few things to sort out beforehand to ensure things run as smoothly and as productively as possible on the day.

Be clear on your needs

You and your team members will have met already to nail down your key selection criteria. What do you need to help increase revenue and reduce costs, and how will an ERP help deliver this? These points are why you are even in the market and you must ensure all demos cover these extensively.

You should also have listed additional features that would be nice to have but are not absolutely required. These should be ranked in importance, and ideally you'd want to see as many of the top items as possible in a demonstration.

Draw up a script

ERP providers have standard demos ready. They have presented these to many prospects. You can be sure that these demos highlight all the points where this ERP considers itself strong and skips by any points where they know they are not competitive. Force them to show them what you want to see by sending out a script for them to

follow, or by demanding their script in advance.

Once you have the script in hand, rework it to meet your needs and interests. Make certain all your vital concerns will be shown. You might have team members who cannot be present for an entire demo. Rearrange the timing so that all members have a good chance to see their interests demonstrated in enough detail. Eliminate any time devoted to features you will likely never need.

One scripting option is to draw up some scenarios based around your key requirements for the salesperson to talk you through. Don't give them an easy ride though – you want to test the limits of the system, so design scenarios that could potentially expose hidden weaknesses.

Consider customization and integration options

Many businesses will need to integrate their new ERP with systems they already use or are planning to purchase elsewhere. You could take a salesperson's statement that it will all connect easily through web services. Better still, ask for a demonstration that displays what steps are needed for a simple integration.

Think of a customization you think you might want to use with the ERP. Ask for a demo that shows the steps to perform that customization and the desirable results.

Develop a scorecard

How well was a feature demonstrated? How closely does that feature seem to meet the needs? These are big, open questions and will require a uniform scorecard in order to evaluate effectively.

Some questions and criteria can be answered with a simple yes / no response. Others will need some kind of ranking scale. Be sure the score card covers all the vital features you have determined are important to you. Include points from the 'nice to have' list as well.

When the demos finish, you will be tired and your feedback will be floating around your mind in a blur. Completing scorecards immediately after each demo will help you clear up that blur. Hard numbers might indicate the demo you liked best actually ranks lowest.

02

During the demo

During the demo

You've planned some promising demos and have appointments with vendors who you think could fit well with your company. You've prepared well and have managed to get them to use your script. Now you need to think about who should be there, and what you should ask them.

Ensure the right people attend

Look back to why you are looking at a new ERP. If your primary motive is to be able to accept orders faster and to deliver them in a shorter time, then sales and production people must attend. If your customers demand improvements in production quality systems, the necessary audience changes.

Everyone in your company has a job to do, and there's a possibility that some of your team won't be able to spare time to attend the whole demo. If absolutely necessary, allow people snowed under with other work the flexibility to leave after their concerns have been addressed, but do ensure that they attend segments of the demo relevant to them and their team. The accounts manager must attend the payroll segment of the demo, for example. Be firm on this.

Ask the right questions

Make sure the questions asked during the demo provide complete

clarity on how the ERP will help your business. If production jobs currently require too much effort and overhead, you want to know by the end of the demo that the new ERP really is easier to use. If your best customer wants a portal or other method to enter their own orders into your ERP, be sure the vendor demonstrates this, and that you ask enough questions to understand how it works and how much effort will be required. Determine whether the solution will be acceptable on both sides.

Some questions should be asked to help understand workflow. You might be satisfied your group's work can be done well. But, what about your internal customers? Will the ERP provide them the results required? What about your internal suppliers? Can the ERP help provide what your group needs?

Arrange to have some questions asked by more than one person during the demonstration. We all have selective perception. The accountant could have heard a completely different response than was heard by the engineer.

Plan questions ahead of the demo. This way you won't overlook important points as the conversation moves between your team and the demonstrators. Remember that there are no stupid questions. If one person needs more depth, another person almost certainly does too but might not have found a good time to ask.

Focus on what's important

Be sure that all present take notes and complete their scorecards promptly after each demo has finished. After demonstrations by several ERP providers, you want to be able to accurately remember which one answered the question best. The best way to do this is to score as you go along.

03

Post-demo

Evaluating ERP demos

You've sat through hours of demos, and now you need to make a decision about which vendor you would like to continue the conversation with through RFQs and contract negotiations. It's not an easy decision to make, though all the planning you did pre-demo will come into its own at this point and make things seem more manageable.

What does an ERP demo score sheet look like?

Begin with basics: name of the ERP, name of the demonstrators, date, time, length of the presentation are a few data fields you need to start with. Next, return to the reasons you are considering an ERP system. Consider each reason. Did they cover it at all? Was there enough depth? Would you definitely rule this ERP out after the demo, or is it still in consideration?

Devise ways to quantitatively evaluate the replies. You could use a 1 to 10 scale or a range from 'perfectly meets our needs' to 'completely fails to meet our needs'. Provide a small space with room for up to 100 words to elaborate on how well this ERP responded to your needs.

Repeat these questions for each of your must-have ERP requirements. Then ask a few qualitative questions such as whether the presentation was well-coordinated and professional. Did the demonstrators

respect your time and stay within the limit you requested? Did they spend enough time on your points and not too much on points they think make their software sizzle? One last question could be a wide-open request for the viewer's opinion. These last questions are mostly to break ties. Whether they can satisfy your requirements is critical.

Evaluating your ERP demo scores

Collect a score sheet from every person who saw the demo whether live or perhaps a recorded version if they were unable to attend the live presentation. Check against your attendance logs to be sure everyone turned in a reply. Enter each reply score in a spreadsheet and total up the scores. You can eliminate some most of the ERPs from consideration at this point.

First, look at the scores you recorded. Are there any statistical anomalies? Someone might have given a ten score when all the others were in the 6 – 7 range. Talk to that person and understand why the scored it so high – did they see something no one else saw? Take the average score and keep going to calculate the median and mode too. That lone 10 score can skew a mean but will not affect a median.

You now have your top ranked ERP demos. Let your team see the totals and ask for feedback on those top few only. One ERP might have a high score but also left behind a bad taste in someone's mouth. Understand why that taste was left and think about whether

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this ERP should be a finalist. If that someone is the boss, be careful about backing that ERP as a primary contender

You will be left with one ERP provider with whom you will continue the conversation, and possibly a second choice option as well. You can grab a quick breather before proceeding full-steam ahead into the RFQ and contract negotiation phases. Good luck.

04

Template demo scorecard

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Requirement name

Requirement score

How did the system meet your requirements?

What are your reservations?

Why did you give the above rank?

Repeat the above section for all your key ERP requirements.

It's important to take detailed notes on how a vendor system will perform your required functions and operate in your business on a granular level. Once you have noted these details, keep track of how the system stacks up with our requirements overview.

Requirement name	Score	Confidence

FURTHER QUESTIONS

Was the presentation well planned and carried out professionally? Why do you think so?

Was the time devoted to our key points? Which points were given too little or too much time?

Was too much time used on anything other than our key points?

What other comments do you have regarding this demo?

ERP Demo Guide and Scorecard

This guide was written by Tom Miller ERP Focus Columnist, with contributions from Megan Meade, ERP Focus Editors.

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