



Case Study

#2022-07

ERP Selection

Client: Large diversified Mechanical Contractor with Service and Fabrication

Duration

June 2022 – October 2022

Client Size

(Annual Revenue)

- \$10M to \$50M
- \$50M to \$200M
- ◉ \$200M to \$500M
- \$500M to \$1B
- Over \$1B

ERP Application:

- From Penta to CMiC and FieldPoint

Other Related Applications

- Procore
- Textura
- Salesforce



Problem

The company had reached a point where their current ERP was no longer growing with the business or meeting the more advanced needs of the organization. They also wanted to find a better Service Management solution that would address their needs. They were hoping to eliminate a lot of spreadsheets being used to support their current processes.

Unique Challenges



Decentralized operation with each of the division's operating independently with little standardization of systems use or processes. It was challenging to get agreement on requirements across the organization in order to find a single solution to meet requirements. Not all ERPs that would have been appropriate for the organization had the requisite capabilities in Service Management.

Approach



BCG conducted a standard ERP selection process with a return on investment (ROI) exercise in the beginning to help ensure the pay back could be assured from making the move.

Key business processes were mapped and valued. From there the ERP requirements were gathered, a request for proposal (RFP) developed, and vendors short-listed. Then demonstrations were held with two primary vendor candidates and a finalist was chosen. The finalist was vetted further with additional demonstration time and reference calls. Final licensing was negotiated with input and support from BCG.



Resolution



Certain larger, more configurable ERP solutions, considered initially were eliminated due to cost and complexity. Eventually COINS and CMiC were vetted thoroughly along with FieldPoint for Service Management. The client chose CMiC with FieldPoint for Service. The organization felt this was a good compromise to meeting the disparate needs of the different divisions in the organization. A number of people within the organization were involved in the selection and there was excellent buy-in on the decision from Operations, Accounting and Support Services.



Client Testimonial:

From IT Director:

"Burger Consulting with their considerable industry experience, was able to help us quickly document requirements from each of the business units and then guide our team efficiently through the complexity of the ERP landscape. They did a good job of soliciting our input throughout the process while still making their thoughts and opinions known. Their independence from the vendor community was clear from the beginning. This process would have taken far longer on our own and the results would have been less certain."



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