

JENZABAR WHITE PAPER

ERP Buyer's Guide for Higher Education



Jenzabar[®]

Contents

The Imperative for Digital Transformation: Why Higher Education Institutions Are Implementing Modern ERPs	2
Identifying Problems and Bridging Gaps: How ERPs Address Higher Education's Biggest Challenges	3
Industry-Agnostic ERP vs. Higher Education ERP	4
Best-of-Breed ERP vs. Single-Vendor ERP	5
Cloud ERP vs. On-Premises ERP	6
Conducting a Needs Assessment	7
Needs Assessment Checklist	8
Finding the Right Vendor	10
Vendor Research: A Three-Pronged Approach	10
Evaluating Your Options	12
Conclusion: Ensuring ERP Success	15

The Imperative for Digital Transformation: Why Higher Education Institutions Are Implementing Modern ERPs

In the last two decades, technology adoption on college campuses has increased at a dramatic rate. Often hesitant to enact big change, many colleges and universities have taken a gradual approach to technology modernization, which has resulted in software ecosystems akin to patchwork quilts. At the time of their implementations, these now-legacy systems met campus requirements. These days, however, integration and security issues, siloed data, and manual processes make it difficult for institutions to be efficient and agile amidst a rapidly shifting higher education landscape. Now, higher education has received an urgent call for digitalization, and institutions are looking to find and implement modern systems. At the heart of this transformation: the enterprise resource planning (ERP) system.

In the business world, ERPs are comprised mainly of finance, HCM, and CRM systems. These systems are integrated with one another so businesses can make better use of customer data to improve products and processes. ERPs for higher education are only slightly different. Higher education ERPs include finance and HCM systems as well as student information systems. Many also contain learning management, financial aid, and admissions systems, giving institutions a unified platform for managing the entire student lifecycle as well as institutional operations.

For many institutions, finding, selecting, and implementing the right ERP system can be daunting. College administrators must navigate a complex landscape of vendors to ensure the system aligns with their unique strategic goals and budgetary constraints. More specifically, decision-makers must choose between several core approaches:

- ▶ Should you select a brand-name, **industry-agnostic system** or opt for a **higher education-specific ERP**?
- ▶ Should you leverage an end-to-end system from a **single vendor** or build an a la carte, **best-of-breed solution**?
- ▶ Does your campus need a **cloud-based ERP** or one that is hosted and managed **on-premises**?

This white paper aims to provide higher education leaders with a comprehensive guide to navigating the ERP selection process. We'll compare different ERP system types and provide you with the information needed to select the right ERP for your campus.

In the business world, ERPs are comprised mainly of finance, HCM, and CRM systems. Higher education ERPs include finance and HCM systems as well as student information systems.

Identifying Problems and Bridging Gaps: How ERPs Address Higher Education's Biggest Challenges

To find the right ERP for your campus, it's important to understand what challenges you need your system to address.

Financial challenges like rising costs and inconsistent budgets make achieving institutional sustainability increasingly difficult. Operational challenges like grappling with data silos, outdated technology, and new program adoption can cause campus-wide frustrations. Student challenges like declining enrollment, engagement, and career readiness are complex both to diagnose and to solve. And tackling workforce issues like faculty shortages and staff retention is like playing a game of whack-a-mole: for every new hire, another vacancy appears.

When these challenges come together, they impede an institution's ability to operate efficiently and deliver to students a high-quality education. Fortunately, modern ERP systems can address these very issues.

Modern ERPs can:

- ▶ **Drive Data-Informed Decision-Making:** ERPs come with varying levels of integration capabilities. To gain real-time insights into institutional, operational, and even student performance, you need to integrate your data onto a single platform.
- ▶ **Improve Productivity:** By uniting disparate systems on one platform, ERP systems streamline workflows and can help you automate previously manual tasks. This empowers staff to be more productive and focus on strategic initiatives.
- ▶ **Enhance Security:** As a single platform, an ERP may reduce the risk of data breaches through enhanced data governance and credential requirements. Because of their comprehensive nature and significance, many ERP systems also include some form of data backup and recovery.
- ▶ **Streamline Enrollment:** With centralized application processing and improved communication between departments on campus (financial aid, admissions, etc.) as well as between staff and students, an ERP can make the enrollment process more efficient. Many ERPs also contain automated workflows that free up staff to spend more time interfacing with students. These workflows are often unavailable through third-party integrations.
- ▶ **Increase Engagement:** ERPs are meant to bring systems together to boost transparency and collaboration. When the features are easy to use, an ERP can enhance student and staff experiences and improve engagement.

There are myriad ERPs to choose from, but among the most significant decisions will be to choose from an industry-agnostic system or one designed for higher education; an ERP that comprises offerings from multiple vendors or a holistic solution from one vendor; and an ERP that lives on-premises or one that lives in the cloud.

Higher Education ERP vs. Industry-Agnostic ERP

The conversation about choosing an industry-agnostic ERP that is more generic vs. a platform that is built for the higher education market can be boiled down to one argument: Do you want a system with the brand recognition and size of a Fortune 500 company, or do you want one from a company specializing in a niche market? When you dive deeper into this argument, you can find more detailed insights that break down that thesis point, including factors like cost, scope of functionality, support, implementation, and more.

Below, we offer a side-by-side comparison of industry-agnostic ERPs and higher education-specific ERPs.

Higher Education ERP	Industry-Agnostic ERP
PROS ✓ Specialized Functionality: Higher education ERPs are designed (often by higher education experts) to address the specific needs of colleges and universities. They offer student lifecycle and curriculum management, financial aid processing, and alumni engagement tools, among others, seamlessly integrated with one another. ✓ Streamlined Implementation: Because higher education ERPs are designed with colleges in mind, they tend to integrate more easily with systems commonly used in higher education (admissions tools, learning management systems, etc.). This can reduce customizations and simplify the implementation process. ✓ Vendor Expertise: Higher education ERP vendors generally have a deeper understanding of the specific challenges and regulatory landscape faced by colleges and universities. They can provide targeted support and address concerns specific to your institution.	PROS ✓ Lower Initial Cost: In many cases, industry-agnostic ERPs have a lower upfront cost compared to higher education-specific solutions because the technologies are not heavily specialized. This can be attractive for institutions, especially as more pressure gets placed on ever tightening budgets. ✓ Wider Range of Features: Generic ERPs often offer a broader array of functionalities because their customer market can come from businesses across industries. This might be beneficial if an institution has operations outside the core academic sphere like facilities or supply chain management.
CONS ✗ Limited Feature Breadth: While catering to core needs, higher education ERPs may not offer the same wide range of features found in industry-agnostic solutions. This might require integration workarounds with additional systems if your institution has non-academic departments with specialized needs. ✗ Higher Cost: Because they offer specialized functionality, higher education-specific ERPs may have a higher initial cost compared to generic solutions.	CONS ✗ Limited Functionality in Key Areas: Because industry-agnostic ERPs are meant for a wider range of industries and users, they can lack functionalities specific to higher education, such as financial aid management, curriculum tracking, or alumni relations systems. Not only does this mean they will not deliver critical capabilities out of the box, but they may also necessitate extensive customizations. ✗ Integration Challenges: Integrating a generic ERP with core higher education systems like financial aid, learning management, and student information systems can be complex. Customization efforts to bridge the functional gaps may require additional resources and expertise. ✗ Limited Vendor Support: Because generic ERP vendors sell to myriad industries, they may not have the same level of understanding or expertise regarding the unique challenges and complexities of higher education institutions. This can hinder support and troubleshooting processes.

Conclusion

Both higher education-specific ERPs and industry-agnostic systems have their benefits and setbacks. Because each institution is different, there is no one-size-fits-all approach here. You need to evaluate each of these pros and cons and determine if any outcomes outweigh their counter arguments.

What Does an ERP Built Exclusively for Higher Ed Look Like? [Click Here to Find Out](#)

Single-Vendor ERP vs. Best-of-Breed ERP

Higher education institutions generally have two options when it comes to selecting an ERP: a best-of-breed solution or a single-vendor system. A best-of-breed solution usually refers to an a la carte model, i.e., decision-makers cherry pick offerings from multiple providers. A single-vendor system, conversely, describes an end-to-end ecosystem of offerings from one provider.

Each type of system has its strengths and weaknesses, some of which may be more important to you than others. Below, we offer a side-by-side comparison between best-of-breed and single-vendor ERPs.

Single-Vendor ERP	Best-of-Breed ERP
PROS ✓ Reduced Complexity: Solutions from a single vendor are often written using the same code, allowing offerings to be pre-integrated. This can simplify implementations and reduce the need for integration software. ✓ Unified Data Source: A single-vendor ERP will most likely leverage a central data repository, enabling teams across campus to access consistent, unified information. ✓ Standardized System: A single-vendor ERP ensures that everyone on campus leverages the same systems. This can improve productivity by minimizing redundancies as well as deviations in processes. ✓ Consistent User Experience: Most systems across a single-vendor ERP will use a common interface to create consistent user experiences. This can reduce training, improve user adoption, and boost ease of use. ✓ Lower Long-Term Costs: Initial costs for a single-vendor solution may seem high, but there are more options for lower long-term costs. Not only will there be fewer licensing fees, there will also be lower costs associated with training, implementation, and integration.	PROS ✓ Wide-Ranging Functionality: Best-of-breed ERPs allow you to pick and choose the systems, solutions, and functionalities your campus needs. As a result, you will often get a more feature-rich environment that some single-vendor ERPs don't offer. ✓ Greater Flexibility: The modular tech stack behind a best-of-breed approach means you can upgrade or replace technology as you wish, rather than be forced to upgrade entire systems. ✓ Broad Vendor Expertise: Because best-of-breed systems often comprise market-leading offerings from multiple vendors, those vendors will likely be well versed and experienced in their specific domains. As a result, you may get broad, highly specialized support. ✓ Option for Lower Costs: With a best-of-breed approach, you will not be forced to pay for systems that you do not need. This means you can potentially get away with a slim ERP that costs less than an end-to-end system from a single vendor.
CONS ✗ Vendor Lock-In: Going with a single-vendor ERP can limit your availability to cherry pick the ideal solutions that certain departments or users may want. ✗ Limited Functionality: While single-vendor ERPs are comprehensive, some might not offer the same level of functionality that best-of-breed solutions do.	CONS ✗ Integration Challenges: Integrating best-of-breed technologies can be complex and time-consuming because each system may contain its own data format and customizations. ✗ Stacking Costs: With a best-of-breed ERP, you will likely need to juggle multiple licenses, implementation fees, maintenance and support costs, and customizations that can pile up. ✗ Data Silos: Even with a successful integration, data silos can persist in best-of-breed ERPs, which means information might not flow seamlessly between systems. This can negatively impact collaboration and data-informed decision-making. ✗ Complex Vendor Management: In a best-of-breed environment, you need to manage multiple vendors and contracts. As a result, it can be difficult to get support and challenging to balance and maintain so many relationships. ✗ Training Challenges: With no uniform design or user experiences across software components, you will likely need to train users on multiple systems within a best-of-breed ERP.

Conclusion

While both best-of-breed and single-vendor ERPs have their advantages and drawbacks, many institutions have come to the realization that the drawbacks of a best-of-breed platform far outweigh the benefits. The benefits of single-vendor ERPs—including a consistent user experience, a single data model, and better support—are substantial, which is why many institutions have made or are making the decision to leverage single-vendor solutions.

Learn More About the Best Single-Vendor ERP on the Market. [Click Here](#)

Cloud ERP vs. On-Premises ERP

Not all ERPs are created equal. Some are designed to improve student engagement but come with integration challenges. Others have stellar HCM systems but lack some of the functionality of modern student systems. Then there are cloud-based ERPs, opposed to the traditional on-premises solutions.

Depending on what your institution needs, you may find an on-premises ERP perfectly acceptable, while other institutions make the move toward the more scalable cloud solution. To help you identify which works best for your campus, we offer a side-by-side comparison between cloud and on-premises ERPs below.

Cloud ERP	On-Premises ERP
PROS ✓ Low Capital Expenditures (CAPEX): Unlike on-premises systems, there are few large, upfront costs when migrating to a cloud ERP. While there are costs included with the migration, these are generally lower than the costs associated with purchasing hardware and resources to host an ERP on-premises. ✓ Strong Security: A cloud-based ERP's data and system security is unparalleled and often far outmatches the capabilities of on-premises systems. ✓ Near-Limitless Scalability: Leveraging resources from off-based infrastructure, cloud-based ERPs are much more scalable than their conventional on-premises counterpart. With elastic scalability, cloud ERPs can automatically increase or decrease storage capacity and resources to accommodate growth or activity spikes without major infrastructure upgrades. ✓ Automatic Updates: Maintenance challenges are typically a concern of the past when you leverage a cloud-based ERP, which automatically applies system changes, security patches, and other updates. This frees up your IT staff to focus on other priorities. ✓ Enhanced Accessibility: Cloud ERPs are accessible from any device with an internet connection, allowing authorized users to access the system or work remotely. ✓ Strong Business Continuity Capabilities: Due to their hosted nature, cloud environments are inherently more resilient than on-premises ecosystems. As part of a strong disaster recovery plan, cloud ERPs can ensure business continuity in case of unforeseen disruptions.	PROS ✓ Low Operating Expenses (OPEX): Generally speaking, on-premises systems are seen as fixed assets with low operating costs. There are still costs when running day-to-day operations with an on-premises system, but these systems are not incurred to the same subscription plans as cloud solutions. ✓ More Data Control: With an on-premises ERP, institutions have much more control over their data and security protocols. This can be important for institutions handling highly sensitive personal and financial information. ✓ Enhanced Customizations: Because they're hosted on-site, on-premises ERPs can be customized, modified, or altered as decision-makers or IT staff see fit, ensuring the solution meets the precise needs of your institution. ✓ Restricted Access: Unlike a hosted environment, which can be subject to third-party access, an on-premises system can be much more gated in terms of access—especially physical access. This can lead to stronger security capabilities in certain areas. CONS ✗ High OPEX: While cloud ERPs often don't require substantial upfront costs, their day-to-day costs can add up over time, especially if there are licensing fees, contracted services, and other expenses. ✗ Internet Reliance: Cloud ERPs require a stable internet connection, which means that any internet connectivity issues will disrupt operations. ✗ Limited Customization: While this is not true of all providers, many providers of cloud ERPs often offer less flexibility for extensive customization compared to on-premises systems. CONS ✗ High CAPEX: On-premises ERPs require significant upfront investment in hardware, software, and implementation services—not to mention costs associated with cooling, power, etc. ✗ Increased IT Requirements: On-premises ERPs need a dedicated IT team with expertise to manage, maintain, and update the technology infrastructure. For institutions with lean IT teams, this can be a real problem. ✗ Scalability Challenges: Adding capacity can be expensive and complex within an on-premises system, as doing so may require additional hardware or software licenses. ✗ Additional Disaster Recovery Requirements: With an on-premises ERP, institutions need to find and leverage supplementary disaster recovery solutions to ensure their data is backed up (often off-site) in case of emergencies on campus.

Conclusion

As previously mentioned, there's no one-size-fits-all approach to ERP selection. That said, because the higher education landscape is constantly in flux and because system security has become one of the most pressing IT concerns today, the low upfront costs, scalability, and strong business continuity that accompany cloud systems are making them a top choice for institutions updating ERP systems.

Conducting a Needs Assessment

Selecting the right ERP for your campus requires a thorough understanding of your institution's specific challenges and needs; you need to perform a needs assessment. To ensure that you choose the system that best aligns with your strategic goals and operational requirements, we've created a checklist to get you started.

Needs Assessment Checklist

Step 1. Involve Stakeholders

- ☐ **Identify key stakeholders (module managers, department heads, etc.).** Assemble a cross-functional team with representatives from various departments that will be directly impacted by the ERP. This may include representatives from finance, human resources, student services, IT, academic affairs, and other departments.
- ☐ **Solicit input from faculty, staff, and students.** This can be done using online surveys, holding town hall meetings, or forming focus groups. Make sure that you understand the main challenges and pain points from each cohort.

Step 2. Define Your Requirements

- ☐ As you meet with faculty, staff, and students, make sure you also analyze current processes so you can identify areas for improvement.
- ☐ List out the specific things you need your ERP to do.

Step 3. Consider the Type of ERP That You Want

- ☐ **A Higher Education ERP vs. Industry-Agnostic ERP:** Many institutions looking at ERPs still mix and match core systems. Consider the benefits an industry-specific solution might bring to your campus and weigh these against the capabilities of other, industry-agnostic offerings.
- ☐ **Single-Vendor ERP vs. Best-of-Breed ERP:** Some ERP vendors offer module solutions for every department on your campus. Consider whether a fully integrated system with a unified platform is best suited to your needs, or if a system with more customized modules works best for your campus.
- ☐ **Cloud ERP vs. On-Premises ERP:** Many ERP vendors offer both cloud or on-premises systems, and there are pros and cons to each type. Consider if your campus would rather house its ERP on site or if moving it to a scalable, but off-site, environment suits your needs best.

Step 4: Identify Important Systems You Want to Access

Generally, an ERP system incorporates student, financial, and HCM solutions, but you can add on modules to enhance campus operations and improve user and student experiences.

- ☐ **Analytics and Reporting:** Turn complex information into insights and generate easy-to-understand reports to support data-driven decision-making.
- ☐ **Advancement:** Manage alumni databases, fundraising programs, campaign progress, and more within your holistic ERP.
- ☐ **Communications:** Leverage built-in communications capabilities to maximize engagement across campus and improve collaboration between departments.
- ☐ **Financial Aid:** Access financial aid tools to improve how you deliver and communicate financial aid offers to students.
- ☐ **Learning Management System:** Incorporate your LMS into your ERP to simplify how you manage courses, gradebooks, tests, and more.
- ☐ **Retention:** Leverage predictive analytics and early alert systems to improve student outcomes, enable quick interventions, and boost persistence.
- ☐ **Constituent Relationship Manager (CRM):** Manage student recruitment and outreach, simplify the application process, and nurture learners from prospect and onwards.
- ☐ **Non-Traditional Program Management:** Manage your continuing education programs, non-credit enrollments, alternative credentials, etc.
- ☐ **Workflow Management:** Give staff the power to automate processes to improve productivity, enhance collaboration, and deliver better student experiences.

Step 5. Plan Your Budget and Implementation Timeline

This is where many vendors vary widely. Understand how long implementations typically take. Research whether your prospective ERP vendor has a history of on-time and on-budget implementations. Make sure you understand the implementation process, including data conversion, onboarding, and training.

**Which Higher Ed ERP Provider
Has the Best Track Record for
Successful Implementations?**

[Click Here to Find Out](#)

Step 6. Define Desired Outcomes

Not all ERP systems are created equal. Deciding to pursue a single-vendor ERP might mean having to compromise on outcomes that are “must haves” vs. those that are “nice to have.”

Examples

Must Haves	Nice-to-Haves
• Informed decision-making • Streamlined enrollment process • Access to real-time data • Improved cost control	• Streamlined workflows • Reduced administrative burdens • Improved collaboration • Enhanced mobile experiences

We’ve compiled a list of potential outcomes below, but your institution may have different desired results.

- ☐ **Streamlined workflows:** Reduce processing times and manual tasks across all departments.
- ☐ **Improved communications:** Improve transparency, enhance collaboration, and eliminate information silos.
- ☐ **Robust reporting:** Retrieve centralized and accurate information quickly and efficiently to automatically generate reports that help drive informed decision-making.
- ☐ **Streamlined enrollment process:** Increase enrollment by improving the application process, document management, and communications between admissions staff and students.
- ☐ **Personalized student services:** Personally respond to student inquiries faster by providing staff with efficient access to key information.
- ☐ **Enhanced mobile experiences:** Provide mobile access to course information, grades, financial aid, and more.
- ☐ **Reduced costs:** Gain more visibility into spending, eliminate redundancies, streamline processes, improve resource allocation, and reduce maintenance expenses.
- ☐ **Enhanced scalability:** Leverage a system that supports your institution’s growth without requiring expensive upgrades or replacements.
- ☐ **Enhanced data security:** Centralize data management and leverage robust security features to protect sensitive student and institutional data.
- ☐ **Improved student retention:** Utilize early alerts, streamline services, and deliver positive student experiences.

Finding the Right Vendor

For a higher education institution, selecting the right ERP vendor for your campus can be a daunting prospect. Unlike purchasing software for a single department, an ERP system touches nearly every aspect of the institution's operations. As such, you need a vendor that understands the unique challenges of the president's office as well as the challenges that exist in admissions, financial aid, student services, human resources, and more.

As an added complication, you must find the right partner amidst a huge volume of ERP vendors, each with their own strengths, weaknesses, and pricing models. You need to evaluate factors like industry reputation, deployment options, scalability, integration, and more.

Vendor Research: A Three-Pronged Approach

Outlined below are some research strategies/places to find information. By aligning your research results with your identified needs, you can efficiently identify a shortlist of ERP vendors best positioned to address your institution's unique challenges and objectives.



Conduct Online Research

Targeted Search Engine Research: Good research begins at the Boolean search phrase level. In your search engine of choice, make sure you are utilizing keywords specific to higher education ERP systems, "ERP for higher education" or "Higher ed ERP and SIS" or "Best higher education cloud ERP." Get creative!

Vendor Website Research: Once you have identified a list of ERP vendors in your space, visit the vendors' websites and explore. Review product pages, case studies, videos, and testimonials. Use the search bar on their websites and input key terms that appear in your needs assessment.

Read Industry Blogs and Articles: Vendor blogs can be biased places to gather information, so pairing your research on vendor websites with some non-biased industry coverage can help you determine the veracity of the information you have gathered. Look for content from organizations like EDUCAUSE, Inside Higher Ed, EdTech Digest, etc. See what these publications have to say about the latest industry trends, particularly as they relate to technology implementations and innovations.

2 Leverage Industry Analyst Expertise

Read Analyst Reports: Reports from leading industry analysts like Gartner, IDC, or Tambellini Group can provide in-depth ERP vendor evaluations and selection trends. These reports often compare features, functionalities, and total cost of ownership. They break down key trends that often influence ERP selections and occasionally identify specific institutions that have made recent ERP purchases.

Examine Other Analyst Resources: Most analysts also produce webinars, blogs, podcasts, case studies, and other resources that can aid your decision. Compare this information with the information you have gathered from vendor websites.

Hire a Consultant: You can always pay someone to do the research for you. Consultants or even industry analysts offer services to higher education clients, helping conduct needs assessments, streamline research, and create scoring rubrics, among other things.

3 Network With Your Higher Ed Community

Reach Out to Professional Associations: You have most likely engaged with peers at industry conferences or professional associations. Consult with these peers and ask which vendors they have worked with and how their experiences have been.

Check In With Peer Institutions: One of your best sources of information is hands-on experience. Reach out to your peer institutions and see what experiences they have with their ERPs. This can provide even greater insight than any other research you conduct. Just keep in mind that not all situations are the same. One institution's implementation struggle may be a result of internal conflict as opposed to vendor performance, for example.

Read Through Online Forums and Review Communities: Join online forums or communities for higher education professionals. These platforms allow you to connect with peers, ask questions about specific vendors, and gain valuable real-world perspectives. You can also investigate review websites to see how others have rated the vendors and products in which you are interested.

Ideally, once you have gone through these steps, you will be able to identify a shortlist of potential ERP vendors.

Which ERP Vendor Has the Most Higher Education Experience?

[Click Here to Find Out](#)

Evaluating Your Options

It is important to note that when you are choosing an ERP system, you are choosing a technology partner as well. To ensure you select the best vendor for your campus, you will need a well-defined evaluation process. We recommend the following steps:

1 Assemble Your Evaluation Team

To make sure your ERP serves the entire campus, establish a diverse evaluation team with representatives from departments impacted by the ERP system. Be sure to involve stakeholders beyond the core team. Most likely, this team will be comprised of the same team you assembled for your needs assessment.

2 Develop a Scoring Rubric

Although each institution's scoring rubric will be unique, there are some core components that should be included in nearly every rubric.

- ☐ **Define Requirements:** Your list of requirements and desired outcomes established during the needs assessment may have changed during your research. Make sure you refine those system requirements and add these to your rubric.
- ☐ **Assign Weighted Criteria:** Assign weights to each requirement based on how critical it is to your institution. This ensures focus is placed on the most important functionalities.
- ☐ **Consider Design Systems:** Integrate design system aspects into your scoring rubric. A user-friendly and intuitive interface can significantly enhance user adoption and reduce training.
- ☐ **Modern interface:** Is the user interface visually appealing and easy to navigate?
- ☐ **Intuitive workflows:** Can users complete tasks efficiently and with minimal training?
- ☐ **Accessibility:** Does the system cater to users with disabilities?
- ☐ **Evaluate Cost-Effectiveness:** Extend your evaluation beyond upfront costs. Consider factors that can lead to long-term cost savings.
- ☐ **Scalability:** Can the system accommodate your institution's continued growth?
- ☐ **Integrations:** Does the system integrate seamlessly with existing systems without costly custom development?
- ☐ **Support:** Does your vendor provide ongoing support that can reduce the need for additional internal resources?

3

Engage With Vendors

Since you most likely have a shortlist of vendors at this point, it's time to start engaging them in your discussion.

- ☐ **Set Up Vendor Demos:** Schedule product demonstrations with each shortlisted vendor. Prepare a list of questions beforehand to ensure the demo covers your key needs and evaluation criteria.
- ☐ **Ask Essential Questions:** During the demo, make sure your understanding of the vendor and the ERP go beyond basic functionality. Ask in-depth questions.
- ☐ **Implementation Timeline:** What is the proposed implementation timeline? What happens when issues arise that may delay the project?
- ☐ **Customization Options:** How flexible is the system to accommodate your specific needs?
- ☐ **Security Features:** What are the vendor's core data protection protocols? How does the system maintain changing regulatory standards?
- ☐ **Customer Success Stories:** What case studies, references, or proof points does the vendor have from institutions similar to yours?

4

Evaluate and Compare

You are not selecting this ERP system in a vacuum. Most likely you'll be called upon to present your findings to key stakeholders. Before you present your findings, it's important that you synthesize all the information you've gathered. Be sure to include the following items in your final presentation.

- ☐ **Evaluate Vendor Options:** Utilize your pre-defined scoring rubric to objectively evaluate each vendor proposal based on the weighted criteria. Present these scores side by side.
- ☐ **Analyze Comparisons:** Prepare a side-by-side comparison chart to visually compare features, functionalities, and costs of each shortlisted vendor. Going back to your needs assessment and limiting your search criteria to your five most important features/functions can streamline this process.
- ☐ **Discuss Internally:** Facilitate discussions within the evaluation team so that you can come to a consensus about which vendor you will ultimately propose/select.

5 Select a Vendor

After analyzing and reviewing your options, it's time to make a choice, communicate your decision, and begin the process of negotiating the contract and planning the implementation.

Communicate With Your Vendor of Choice

- ☐ **Notify Vendor:** Send a formal notification to the chosen vendor indicating your intention to accept their proposal. This initiates the contract negotiation process and allows them to begin assembling their implementation team.
- ☐ **Kick Off Negotiations:** Begin contract negotiations with the vendor's legal team. Ensure the contract clearly outlines all agreed-upon terms, pricing, functionalities, and timelines.
- ☐ **Meet With Vendor:** Schedule a preliminary project kick-off meeting with the vendor to discuss next steps, establish communication protocols, and begin planning the implementation timeline.

Communicate Your Selection Internally

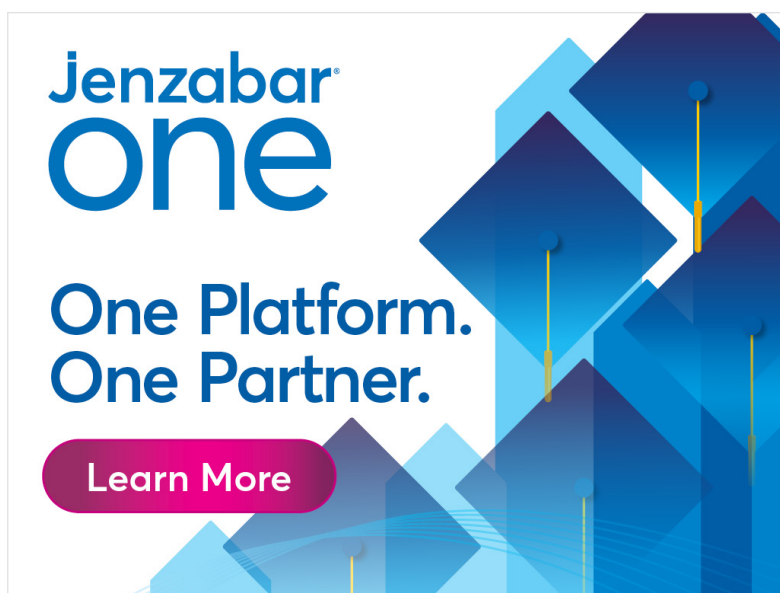
- ☐ **Share the News:** Inform key stakeholders within the institution about your decision. This may include senior leadership, department heads, and representatives from the evaluation team.
- ☐ **Share the Benefits:** Communicate the anticipated benefits of the chosen ERP system and how it aligns with the institution's strategic goals. This helps build enthusiasm and support for the upcoming implementation.
- ☐ **Host an Internal Meeting (Optional):** Organize a campus-wide town hall meeting to inform the broader community about the selected vendor and the upcoming implementation process. This fosters transparency and allows for early questions or concerns to be addressed.
- ☐ **Put Together a Team:** Assemble a core project team within your institution. This team will be responsible for overseeing communication with the vendor, managing user training, and ensuring a smooth transition to the new system.

By following these steps, you should be able to confidently identify your leading ERP system and technology partner. Remember this will be a long-term investment, so take your time to ensure your choices align with your institution's unique needs.

Conclusion: Ensuring ERP Success

By following the steps outlined in this guide, you can navigate the ERP selection process with confidence and ensure you choose a solution that enables your institution to overcome challenges and achieve strategic goals. One thing to keep in mind, however, is that in choosing an ERP, you are also aligning yourself with a technology partner. Choosing a technology partner can be just as important as selecting a system. Partners offer a wealth of expertise and support that shouldn't end once an ERP is implemented.

Once you've narrowed down your list of ERPs and vendors to 1-3 candidates, evaluate whether those vendors align with your institution's goals and values. Look for a vendor with a strong reputation and history of successful implementation, especially in the higher education sector. You'll also want to partner with a vendor that is committed to offering training and ongoing customer support. By carefully considering these factors, you can select an ERP that will drive efficiency, improve decision-making, and position your institution for long-term success.



Find out more

☎ 1.800.593.0028

✉ info@jenzabar.com

🌐 jenzabar.com



About Jenzabar

Created out of a passion for education and a vision for technology, Jenzabar offers disruptive, innovative software solutions and services to more than 1,400 campuses, empowering student success and helping institutions meet the needs of today's learners. For further information, please visit jenzabar.com or on X @Jenzabar or LinkedIn.

