

# Making the Smart Choice

A practical guide to evaluating  
ERP systems and vendors

## WHITE PAPER

Cincom In-depth Analysis and Review



SIMPLIFICATION THROUGH INNOVATION®



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## Executive Summary

ERP systems offer great value to companies, but evaluating and choosing the right ERP system and vendor can be a daunting task. In fact, most people dread a request to participate in a software evaluation project or even worse, being asked to lead an evaluation team. However, these types of projects offer great opportunities for professional development. With careful planning and the establishment of a good team, the process can be very valuable.

All successful ERP implementations start with a sound evaluation and selection process. You should begin by getting a clear understanding of just what line-of-business objectives you are trying to accomplish with the proposed ERP system. Embrace the selection process as an opportunity to learn more about the business processes within your company. This is also a chance to finally change long-term problem areas.

Utilizing the best resources is essential for making the best connection between your objectives and the actual implementation. Remember that any ERP system is only as valuable as the business objectives and strategies it enables, so focus on those aspects first.

The purpose of this guide is to help you define a framework, build your team and help you ask the right questions that will ultimately equip you to make an informed, knowledgeable choice. This paper also provides the tools to help address the business goals of your enterprise and to mitigate the risks. You can apply these concepts to a variety of ERP selection processes.

## Overview of an ERP Selection

Let's take a look at what the selection process should look like. It's really not that complex, but it does involve a lot of hard work. In reality, it contains only five high-level activities.

- Determine your needs
- Evaluate potential vendors
- Select those vendors with capabilities most in line with your needs
- Solicit proposals and pricing
- Evaluate submissions and award contract

Virtually every process you put into action will "roll up" under one of these five activities.

### Key Issues with ERP Selection

There are also a few other general rules to remember. You and your team should keep these issues in mind throughout your selection and evaluation process.

- There is no such thing as a "one size fits all" ERP system, since each should be tailored to the needs of the individual company.
- Realize that getting people to change how they do their daily jobs is the most formidable challenge in getting any ERP system successfully implemented. That's why it is critical to have high levels of involvement in your company from the beginning.
- All products have specific strengths and weaknesses that are more dependent on your objectives than they are on technology.

- Most systems are either built to meet specialized needs or have evolved from a specialty application, meaning they are naturally stronger in some areas and weaker in others.
- Beware of any software vendor that says its suite of applications can totally fulfill all of the unmet needs your organization has for an ERP system. There is no perfect fit—every company's needs are slightly different and customization is always required.
- You might need help. It's fine to solicit help from a third-party consultant, but be diligent about who you choose. Be sure that they really are totally impartial, vendor neutral and objective. Many can bring certain biases or prejudices to the party.
- Beware of turnkey implementation promises. You should be heavily involved in the implementation so that you can be sure you will derive the value you paid for.
- Your final selection will more than likely come down to certain intangibles, such as your level of trust with one vendor versus another.
- Ask for several references in your specific industry, and then visit those implementations (if possible) in person to see how they are using the ERP system to attain their goals.

Finally, there is your team. Remember that an ERP system will touch or affect almost everyone in your company at some point. Almost every business function will need to interface with, be directed by, supply information to, or extract decision-support information from your system.

Your team will need representation from all areas that will be touching the system in their day-to-day activities. Their intimate knowledge of inadequacies and strengths with existing processes will be critical to your success. The



teams and their respective departments need to have a high level of ownership in the design and rollout to ensure that the ERP implementation is a success. This is the only way you will overcome the resistance to change in your organization during the selection process. People have to trust the system to use it, and that's much more likely to happen if the system is designed to fit their specific needs. Stay focused on unmet needs to make sure the implementation is as relevant as possible to the greatest number of people.

An important "first" on the team's agenda is to identify which capabilities need to be prioritized, based on an assessment of unmet strategy and process needs within your company. This will help you with your first cut in the selection process and to prioritize vendors who can in fact meet these needs. Having a tight focus on the needs you are trying to respond to will enable you to quickly cut through all the whistles, bells, frills and glitz that are irrelevant to your organization reaching its goals. Avoid making requirements a "shopping list" based on whims and fancy rather than absolute unmet needs. Ensure you don't have conflicting requirements.

Once you have established the basic system requirements, you will need to establish some budget parameters related to the overall costs associated with the new system. Keep in mind that your budget will need to cover more than licensing fees. You will also have training and implementation expenses. These two items can easily outstrip the licensing fees themselves.

## Initial Stages of ERP—Checklist

This checklist summarizes the basic steps for the initial stages of the ERP selection process.

- Launch the selection team. Include effective representation from all stakeholders. Understand what

the business expects, why the project is being done and if there is a compelling reason to do the project. Remember that whoever is included on this team will have a direct influence on the adoption of the system and the ability to overcome resistance to change.

- Create minimum capabilities based on your objectives, strategies and unmet needs. Map your strategies, objectives and unmet needs to system features, and then use this matrix for evaluating vendors. Add in a column for references too, since you will want to see who lives up to the hype about their solutions.
- State high-level budget parameters and research costs to avoid sticker shock.
- Establish specific deliverables for your team and stick to a project schedule. The credibility of the project internally is based on its ability to meet deadlines and deliver results.
- Determine how you will make certain decisions. What will be the criteria for creating your long list, short list and final selection? Know that how you manage this will determine if departments most affected by the system will own it after it is rolled out.
- Understand the acquisition process that is required for approval of a project of this scale. Who has to approve and sign off on the critical stages of selection, implementation and system acceptance?
- Determine the success criteria. How will you know when the project is indeed a success? It is a good idea to have a dashboard or scorecard in place to measure performance of the system and its contributions over time.

These steps will significantly lower the risk associated with the project in general—and to you personally as the project manager. It will also infuse ownership into the system implementation as well.

Remember: The credibility of any project like this is huge, and getting buy-in from those most affected by the change is crucial if resistance to change is going to be overcome.

This is not meant to imply that your primary concern should be risk aversion. This will, however, be an opportunity to leave a lasting imprint on the processes and systems of your company, enabling them to be more productive and efficient as a result. Your goal should be to encourage constructive participation and nurture ownership of the system to make sure change happens and is lasting.

Running the selection process associated with a new ERP system is going to involve some headaches, but it can also turn into a highly rewarding experience. Many ERP project leaders have been awarded significant promotions following a successful project.

## Executive Sponsorship

The bottom line is that everyone in a company watches the CEO and senior management to see if their calls for change are sincere. If they are, then change is easier. So get your C-level execs onboard early and have them change how they work as well, to further make change management programs effective. You must, as a result, have a C-level sponsor who is willing to do whatever it takes to make sure this system implementation is successful.

The Executive management undoubtedly has an overall vision of where the enterprise is going and how the ERP system has to fit into that vision and must be well understood and integrated into the selection process managed by your team. Periodic reporting to management at certain milestones will assure that your project team stays on target while also leading to greater credibility for the project over time.

It is essential and necessary to have a designated executive named as the team's primary management interface, or sponsor. This person would be available upon short notice to settle conflicts, make command-level decisions and to lead by example especially when it comes to changing processes and therefore jobs. *Think of this executive sponsor as the most powerful change agent you have.*

## Selection Process Details

Now we want to look a bit deeper into this process. We need to establish a bit more detail regarding the specific steps to take in the evaluation and selection process.

### Makeup of the Evaluation and Selection Team

The first step is critical—team selection.

Anyone who has run a project team or has been responsible for a system change has had to face the challenge of getting consensus or agreement on critical issues. That is why the membership of the selection/evaluation team is so very important. The team selection process is the catalyst of making change permanent based on the implementation of the new system.

You don't want those who agree with everybody about everything, but you also don't want those people who chronically complain, whine and warn of impending disaster. Select folks who are effective and inspire trust and confidence among their co-workers. You want people who know how to get things done—natural leaders. Pick the best—the people you can least afford to lose. You must get the people most passionate about change on these teams if the system is going to succeed.

The membership of the team should include representatives from the major stakeholders within your organization across each functional area affected by the system implementation. If you can't get someone from a particular department or group, at least get someone designated within that group to review your team's recommendations and actions and to provide feedback on behalf of that unit.

In addition to your internal contacts, you might want to consider some input, if not active participation, on the part of your customers and suppliers. These are, after all, the people you buy from and sell to. You can at least get their input in terms of who they use, what to expect during implementation and any possible pitfalls to avoid.

Are there any possible synergies to be gained by interfacing with suppliers and customers through an integrated ERP solution up and down the supply chain? Forward-thinking companies involve their suppliers in the development of their ERP systems, especially if their business models rely heavily on inventory turns.

Common sense can also help with your selection of committee membership. Avoid populating the team solely with people you get along with, because this leads to "Group Think" and a tendency to squash perspectives not consistent with their own. Many times the best advice can come from someone who does not burden themselves with concerns about your personal feelings; someone focused on the unmet needs of the organization and not their own political agenda. I'm not talking cantankerous curmudgeons, but rather those who are comfortable in being honest and straightforward. Go for the people who are passionate for change and who have shown the ability to lead new strategies, and you will be miles ahead in getting the system implemented.

As mentioned earlier, there can be value in engaging a consultant to participate in this process. If you do include



a third party in your process, be sure to authenticate them in terms of their past affiliations and customer references, and agree beforehand what their roles and boundaries will be in the process.

## Determine the Requirements

Anytime you buy practically anything, you have to establish some criteria for comparing and evaluating your choices. There are always choices, and there are always comparisons to be made. The more complex the product to be purchased, the more necessary it is to identify and prioritize the functional differences between the various products under consideration.

The first step in this process is to re-assess your business. What kind of business are you? What is your market? What issues do you contend with that are unique to your particular business? What are the most pressing business objectives today? In the future? What are the most critical disconnections from a process standpoint in reaching those objectives? Are you a manufacturer? If so, what type? Discrete? Process? Project-based? Is your product highly configurable?

Are your customers within a narrow vertical or are they spread all around in an assortment of businesses? Is your customer base changing? If so, how? Does your market focus carry with it any inherent needs or requirements? Are you highly regulated? What kind of growth are you experiencing? Do you have specialized financial requirements?

And it is extremely important to get with the executive team to understand where the business is going. They have a vision for the future; make sure they share it. What might be a need today might not be one tomorrow.

The answers to questions like these will tell you what functionality you need.

Once you've established your requirements in terms of what you must have, prioritize the remaining capabilities/requirements into an importance hierarchy (see Figure 1). This is an important step from a procurement standpoint.

## Establish Cost or Budget Parameters

This is important because it can save you and your team a lot of time and wasted effort. No one is suggesting that you get a final budget set up prior to looking at product, but it is helpful to know what the expectations are in terms of function versus price.

If there is an expectation for the system to deliver certain functionalities and those functionalities are only available for prices way beyond the monetary threshold set by management, it would be best if this were known and addressed early on in the process. Expectation levels may need to be lowered or pricing expectations modified.

This is also a good time to see what types of license models are acceptable. System pricing is generally composed of three elements: software license fees, education and consulting fees and maintenance or ongoing usage fees.

Some license models will re-arrange these elements in various ways. Subscription pricing will put the software and maintenance fees into a periodic fixed payment schedule over a specified term. They may or may not include education or consulting fees. The same is true for leases and rental arrangements and hosted or Software-as-a-Service (SaaS) agreements.

## Define and Understand Your Buying Process

No doubt your company has some sort of formalized buying process. This is likely defined and managed by a procurement office or purchasing department.

Do they require written RFP and RFI documents? Is it possible to bring in multiple vendors on-site for an in-house vendor fair, demo or shootout?

Your team will want to be sure they understand the requirements your procurement people have as related to the project. This is especially true in A&D and other highly regulated industries.

The vendors you will be dealing with will also likely have defined selling processes that they go through. Your goal should always be to provide a level playing field for your vendors so you can easily make valid comparisons of their offerings.

While it can be tricky to align the vendors selling process with your own buying process, it is necessary.

## Establish Your Team's Specific Deliverables

This is essential, but is surprisingly ignored with some frequency. Is your team supposed to actually negotiate a contract with the vendor? This is unlikely, but your team should know who will do that. Are you creating a short list for someone else to choose from? Are you working with a selected vendor to develop proposal requirements? Are you collecting information or participating in a negotiation? Is the team making the final decision or are you merely making a recommendation?

## Sign Off

Finally, who decides when your job is complete? Are you done once the selection is made? Are you to remain on station until the implementation project is complete? Too often teams like this morph into something else through the timeless tradition of scope creep. You want to be sure that there is a finish line before starting this race.



## Putting the Process to Work

By now, you have a selection and evaluation team in place that can make intelligent selection decisions based upon an accepted set of criteria and parameters. Your team has a good idea what it is looking for and how much it might cost. Also you have populated your team so that you can quickly disseminate information gathered during your search and open feedback loops to assure timely responses to your team's actions.

Now you get to start kicking the tires.

## Establish Your Long List

You will notice almost immediately that there are hundreds of ERP offerings on the market. Just Googling ERP software vendors returns about 396,000 hits. So be more precise with your search terms if using Google. You can't possibly talk to all of them, so the first thing you want to do is look for things that will specifically disqualify them. (See Figure 2.)

This might be something as simple as the supported host environments that they run on. If your IT area is primarily a Microsoft shop, don't waste time looking at products that only run on OpenVMS or z/OS. Maybe the company in question has no local presence in the countries where you operate. If you're international, you are going to want a vendor that is operating where you operate.

If you are a smaller business, you might want to stay away from the big guys, because the smaller and medium-sized vendors are going to value your business more. Just make sure they meet your normal business partnership requirements.

Now that you have established who you don't want to talk to, how do you find those vendors that you do want to consider?

Your long list can be verified by your team members based on some pre-determined criteria. Check vendor

websites, Dun and Bradstreet ratings, as well as any recommendations you might get from people in businesses similar to your own or from your own suppliers and customers.

The analyst and trade community is another great source of information. APICS, Managing Automation, TecEvaluation and many others maintain online buyer's guides. You can obtain a side-by-side comparison of objective data for each vendor you are considering.

The best facilities will allow you to simply check off what features you are looking for, and then they will populate your list with vendors that meet all of your criteria. The analysts, such as AMR, provide a large inventory of reports and assessments of vendors, their products and the market in general. These offer good objective sources of information.

Also, many times you can pick up more subjective information that is not available through vendor websites or company product collateral.

## Gathering Data for Your Selection Team

Your initial list should contain five to seven vendors for you to analyze and compare. The next step involves collecting the data necessary for you to make a decision to keep or to eliminate each vendor in your evaluation group.

There are several ways this might be accomplished. The temptation is always to issue a Request for Information (RFI) or Request for Proposal (RFP). Sometimes this is the best course of action, but be aware that some vendors are better at handling RFIs and RFPs than others. Be careful that you're not evaluating the vendor's ability to properly and quickly fill out the RFI/RFP response form as opposed to evaluating the quality of their offering. These can be two different things.

Also, note the difference between an RFP and an RFI. An RFI should be focused on a more specific subject that you are requesting information about. An RFP would be the instrument used for the final selection process.

Additionally, most vendors are genuinely reluctant to fill these out because they feel they were probably designed in some manner that stacks the responses in a way favorable to their competition.

It has been known that some companies may have worked with a favored vendor to design an RFI that is specifically designed to highlight a favored vendor's strengths and to expose the competition's weaknesses. A vendor will always ask themselves "who wrote this" and old hands can often recognize a familiar style and content.

Another consideration of the RFI/RFP process is the fact that smaller vendors have less capacity for this kind of activity. They may consider unsolicited RFPs/RFIs to just be too resource-consuming to complete. Large companies

have marketing teams that specialize in RFI responses. Small companies have to mobilize engineers, legal personnel, salespeople and product managers at night and over weekends to complete these documents that severely limit their response bandwidth.

If you go this route, be careful not to overvalue the accuracy of the response. There is a natural inclination for the respondent to figure out a way to make any given response seem like a positive response.

Let's say you have a requirement for product configuration within your new system. A "yes" response from the respondent might mean "yes, we have that and ours is the best available" or it might mean "yes, we are trying to move that out of test into production for the next release." Or it might mean "yes, we have something that sort of does that."

Make sure you set a reasonable response deadline. Sending out a thirty-page RFP on Monday with a Wednesday deadline is not going to be met with a lot of enthusiasm. Ten days to two weeks is a minimally reasonable turnaround time for a moderately complex RFP. Two weeks to a month is more realistic.

## Use of Consultants and Other External Resources

Consultants can be useful in this process, but as we said earlier, many selection consultants might carry some sort of bias or preference for one vendor or another. If your goal is impartiality, be sure you appoint a selection consultant that will help you achieve it. If you go this route, ask for references and find out if the guy always recommends a given solution or has recommended the same solution repeatedly. You should know if there is a strong bias at work.

There are good selection consultants whose main purpose is to make sure you have a good representation of comparable solutions that fit your needs. The key to success here is making sure you don't just dump the whole process on them, but engage them into your process.

Again, don't underestimate the value of online resources that provide feature comparison facilities that let you run side-by-side functionality comparisons between most ERP software systems available today.

## The Discovery and Demonstration

Once you have created your shortlist and informed the lucky vendors, you will be tempted to ask them all to come in and demonstrate their wares. Most vendors will request an on-site visit to carry out a more in-depth discovery before doing that. Let them in; it's only fair after all. You're asking the vendors to invest even more, and



they all want to ensure they do a demo that will "hit the spot." Vendors want to meet your people, learn your business and very importantly, start building the relationship. Beware the vendor who doesn't want to do all that; it could be an indication of lack of real interest, lack of value placed on you and your business or sometimes even an arrogance that reflects their own perceived self-importance.

Eventually, of course, you are going to want a demonstration of the proposed solution, but you really only want to do this with your short list of vendors. Don't be tempted to have all your long list of vendors go through a step that is typically quite an expensive one for the vendor in terms of both preparation and execution. Seeing six or seven demos in a short space of time is equally tough on your selection team and can lead to "death by demo," where they all eventually seem to merge into one, and your selection team can become confused over who did what.

So stick to the short list and then make sure that the demonstration is focused on meeting your critical business requirements. Everyone has the ability to raise a purchase order; do you really need to see it?

Anytime you are looking at demos, be sure you are looking at real, general-release software and not a vaporware rendition of something that is promised for delivery in the distant future. That said, you still need to ensure that vendors have a clear roadmap for the future that will continue to add value to the solution you eventually purchase.

## Adapting the System to Your Specific Needs

There will most likely be some functional gaps in every vendor's offering. There will not likely be a perfect solution

for your enterprise right off the rack. There are two strategies for addressing this. Both are useful, but both come with their own unique limitations and strengths.

You can customize the code delivered so the application is modified to fit your specific needs, or you can modify your own processes to accommodate the software.

Before you start customizing the delivered code, re-evaluate your own processes. It is always preferable to not customize if possible, yet in nearly every ERP implementation there is some customization required.

Customizable means the source code is changed to a degree that your copy of the product is indeed the one and only solution for your needs. Make sure your vendor is equipped to help you move forward as their product is enhanced. If you are working with code that is an 85% fit as is, you're doing fine. These numbers can be improved by working with a vendor who is at home in your particular vertical. They are more likely to anticipate industry changes and reflect those in code delivered in the future.

## How Long?

As soon as your selection team has been convened, you will be hounded to set a completion date for the project. This is where having a strong C-level champion for this project comes in. Have your champion set expectations so they can easily be accomplished, even exceeded. Only by doing this, will you be able to emerge with strong credibility for the system and yourself.

Running the implementation program with a project schedule is critical. Create a timeline or project schedule, stick to it and have your C-level champion define the dates so you have their support in doing whatever it takes to keep them.

As you work through the project plan, be realistic and allow your team the opportunity to evaluate vendor and system information and, in some cases, talk with the vendors.

## Tracking the Evaluation of Candidate Vendors and Systems

To the degree possible, set up a matrix of functional needs and desirable attributes for your ideal system and vendor. Next, measure each vendor and system in light of the attributes in your matrix and record your findings on the matrix. This will give you some objective data to consider.

The following is an example of how you might set up your tracking matrix. For each vendor and attribute, assign a value (5 for highest, best and fastest and 1 for lowest, worst and slowest). Once your selection committee agrees on the performance assignments, total each for each vendor and take the top three for your short list.

## The Final Selection

At this point, the final selection will take place. Most likely this choice will not be clear-cut. All two or three candidates should be highly qualified functionally to fulfill your needs.

Then you will want to look at the final candidates in a more subjective light. This will be a long-term relationship that will require a lot of communication between you and the vendor at many different levels. Sometimes things will be subject to pressure and deadlines. How well will they be able to respond? How will your people feel about working with them?

The final selection is not so much about checkboxes as it is comfort levels, impressions, trust and vendor viability. Unless one of the three has completely missed on price, you will likely be looking at which one you "like" or trust the most.

## Viability Tests

With consolidation occurring in the enterprise software market rapidly today, it is critical that you do a complete analysis of whomever you consider selecting by completing the following key research tasks:

- Go to Dun & Bradstreet and pull the supplier and credit reports on their financial condition.
- Go to FREEDGAR, a free service from the Securities and Exchange Commission, and read their last several years of filings. If they are publically held, you will find an abundance of information there. Also pay attention to the 10Qs. You can see if your vendor of choice is being sued, by whom and what their costs and biggest risks are.
- Check out what their customers are saying about them online by checking out Technorati.com, a blog search engine, as well as going to Google Blog Search as well.
- Ask to see their audited financial statement—even if they are private—to ensure they are financially viable.

Chemistry is also critical. Who seems to be most interested in you? Which vendor has the best record in terms of implementation success and timely responses to inquiries? What's the chemistry like at the support level? Are they willing to accommodate any special needs by your administrative functions such as special billing or payment requirements?

What you really are looking for here is a partner. To use an analogy, you're getting married, not going on a date. Which vendor is worthy of your trust and years of investment to transform your organization together?

Figure 1

System Requirements Analysis								
Functionality		Criticality						
		Critically Essential	Highly Useful	Somewhat Useful	Useful but Not Necessary	Occasionally Useful to a Few Users	Neutral	Not Useful
Order Management	Order Processing							
	Shipping							
	Receiving							
Product Engineering	Configuration Management							
	Document Management							
	Design Engineering							
	Process Engineering							
	Revision Management							
	Engineering Change Management							
Operations	Master Scheduling							
	Capacity Planning							
	Production Control							
	Material Management							
	Materials Planning							
	Demand-Driven Planning							
	Kanban Management							
	Manufacturing Execution							
Procurement	Supplier Sourcing							
	Requisitioning							
	Quotations							
	Purchase Order Processing							
	Receiving/Inspection							
	Payment Authorization							
Financials	Production Accounting							
	Inventory Accounting							
	Cost Accounting							
Other	Quality Management							
	Guided Selling							
	Product Configurator							

Figure 2

<b>Vendor Checklist</b>							
<b>Long List Attributes</b>	<b>Candidate Companies</b>						
	<b>Company 1</b>	<b>Company 2</b>	<b>Company 3</b>	<b>Company 4</b>	<b>Company 5</b>	<b>Company 6</b>	<b>Company 7</b>
Meets Critical Function Requirements							
Performance History within Your Vertical							
Meets Physical Location Requirements							
General Business Responsiveness							
Flexibility to Meet Special Needs							
Relative Size (too big, too small or just right)							
Age and Longevity Potential							
Market Reputation							
Implementation Track Record							
User Community							
<b>Total Score:</b>							
<b>Short List Attributes</b>		<b>Short List Company 1</b>		<b>Short List Company 2</b>		<b>Short List Company 3</b>	
Long List Score							
Price							
Implementation Time Required							
Perceived Value							
<b>Total Score:</b>							
<b>Finalist</b>	<b>Finalist 1</b>			<b>Finalist 2</b>			
Short List Score							
Perceived Attitude of Sales Personnel							
Perceived Level of Commitment							
Perceived Value							
Gut							
<b>Total Score:</b>							

## About Cincom Manufacturing Business Solutions

Cincom Business Operations Management and ERP Solutions for complex manufacturers enable lean processes to drive operational effectiveness. By identifying and automating complex manufacturers' most critical business processes, Cincom enables manufacturers to achieve comprehensive enterprise management with fact-based performance management.

Cincom serves clients on six continents, including American Power Conversion, Air Products, BMW, Boeing, Cooper Power, Ericsson, Rolls-Royce, Rockwell Automation, Siemens and Trane.

For more information about Cincom's products and services, contact Cincom at 1-800-224-6266 (USA only), send an e-mail to [control@cincom.com](mailto:control@cincom.com) or visit the product website at [erp.cincom.com](http://erp.cincom.com).

## About the Author

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