



ERP-Specifications:

# Finding the Common Thread in the Project

How to create a good specification sheet in 8 steps





With the specification sheet, companies define the base for success of their ERP project. Some create documents of only a few pages, others a bundle with hundreds of questions. The ERP manufacturer proALPHA reveals what really matters in a specification sheet.

Today more than ever, a company's success is shaped by the selection of the right ERP system. A central data hub, it controls all crucial business processes and forms the digital backbone of the company. A good specification sheet lays the foundation for a successful ERP project. In order for the creation to be successful, the following aspects must be considered:

1

### Specific priorities instead of wish lists

Including the employees in the ERP selection process from the beginning definitely has its benefits – for example, the higher level of acceptance. However, you should exercise a bit of caution here: If you start a survey among the employees, you will most certainly receive long, comprehensive wish lists. If these are adopted into the specification sheet without a filter, you run the risk of already getting lost in a chaos of requirements at the beginning. To prevent this, we recommend that you align the employees' wishes with the tactical and strategic priorities of the company.

2

### Set strategies and goals for the future

An ERP project aimed at only eradicating the current weaknesses of the company and thereby improving the status quo only exploits a small portion of its potential.

Such an endeavor greatly influences the future development, which is why the specification sheet should contain the business objectives for the following years. The catalog of requirements should also contain the market and business development as well as the current trends affecting the corporate strategy. If there are various scenarios or even contradictory goals, these are to be included accordingly. This ensures that the new ERP system has the required flexibility.

3

### Check process chains and identify the weakest link

It does not always make sense to start with the departments which complain the loudest. The real key issues can only be identified and resolved if the company tackles the source of the problems. Therefore, companies should start at the beginning of the value-added chain and continue to interview the other departments along the process chain. This will help the project team to gain a good overview of the entire information flow and the respective dependencies. This prevents the new solution from facilitating one work but



complicating another one in exchange.

4

**Caution, overload: not too much information**

„Too much of a good thing is no good“ – a saying which companies should also consider when creating the specification sheet. If you document all obvious requirements in the specification sheet, it will only grow unnecessarily long and extensive. In these cases, it is enough to list the standard functionalities as keywords. Decision-makers must watch out for the fine line between too much and too little information: They cannot expect the respective provider to have the same knowledge as a person within the company. In order to check this balancing act for clarity and comprehensibility, it makes sense to involve an external consultant or an employee outside of the project team in the assessment of the specification sheet.

5

**Requirements instead of functions: not „How?“ but „Why?“**

If you are already thinking about the implementation during the creation of the specification sheet, you overshoot the target. The employees of the respective departments do not know about the software's technical opportunities. As a result, potentials for automating steps which are currently being processed manually are not even taken into account. Just follow this rule: The specification sheet does not require descriptions of „how“, but of „what“ and „why“.

6

**Carefully examine existing processes**

If you create your requirements based on the current processes, you run the risk of dragging unwelcome negative legacies along into the new system. In the course of an ERP project, processes and workflows are often revised and redefined. As a result, certain requirements change, new ones are added and old ones might even be dropped entirely. Therefore, we recommend that you analyze error-prone processes and those with long cycle times from the beginning and describe their ideal form. This way you can show the right direction and point out the aspects which require special attention.

7

**Describe current and planned infrastructure**

Along with describing the current IT landscape, it is also important that you describe the planned infrastructure in the specification sheet. As the potential solution provider needs an overview of the situation at hand, you should map all current and new interfaces at least schematically. Questions like „Which software applications are connected one to another?“, „Where do we replace manual input with other solutions?“ or „Which locations must also be taken into account?“ are to be considered in the specification sheet.



# 8

## **Draft a short and a long version**

At the beginning of the provider selection process, a short outline of the most important requirements is enough. Four to five DIN A4 pages are a good benchmark here. You should also add a shortened questionnaire. When your company approaches the final phase of the selection process, it is time for the extended version of the catalog of requirements. The providers introducing themselves on the presentation day should receive as

comprehensive an idea of the requirements as possible in order for them to be able to present their possible solutions for the crucial issues of the project.

## CONCLUSION:

In order for the specification sheet to turn out a good foundation, you must schedule enough time for its creation. You can't just write it overnight. The project team should schedule several weeks or even months for the creation. Especially if your company is to be restructured in the course of the ERP project. A defined deadline for the catalog of requirements helps to increase the project discipline and to ensure that everyone is moving in the same direction despite a long preparation phase.

Do you have any questions?

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