

# ERP Transformation & Technology Strategy



In a complex and growing universe of technology options, ensuring there is a clear vision for a technology platform aligned to business and investment strategy is critical. At the heart of operations for every company, today's ERP software impacts every front and back-office function. Well-designed and implemented systems can have a transformational impact on an investment's success.

CBIZ Private Equity Advisory brings deep cross-platform and decades of sector experience to our clients to ensure IT alignment to the business and deal strategy. We bring overarching technology architecture strategy and business transformation experience to drive a scalable and cost-efficient technology footprint over the life of the investment.

Our technology service offerings include:

## ERP Assessment & Strategy Consulting

**Our team of deeply-experienced ERP resources can help clients** understand the issues inherent in existing systems and determine a roadmap forward (e.g., upgrade / enhance, system selection, migration planning).

## ERP Implementation Services

**We bring deep software-specific skills to the table** and can either act as your advocate, leading an implementation in conjunction with a third-party system implementation group; or deliver full-suite implementation services for Sage Intacct and NetSuite solutions.

## Technology-Enabled Business Process Transformation

**We work with our clients to develop an enterprise architecture strategy** consisting of an integrated view of organizational, process, and technology elements – and then lead the ongoing transformation program to implement the future-state environment.

## Interim IT Leadership

**For clients looking to fill a temporary resource gap or augment underperforming IT leadership**, we provide a variety of full-time and fractional interim IT leadership options to stabilize, operate, and enhance IT.

## ERP TRANSFORMATION & TECHNOLOGY STRATEGY *BY THE NUMBERS*

15+

ERP engagements delivered annually, including system selection, business process assessment and optimization, and implementation leadership services for systems such as NetSuite, Sage Intacct, MS Dynamics 365, Sage X3, Viewpoint Vista / Spectrum, SYSPRO, and more.

## Implementation Accountability & Experience

For situations in which companies have selected a software implementation partner to implement ERP software, CBIZ Private Equity Advisory can provide experienced professionals to serve as the company's ERP Leader and advocate in working with the software vendor.

In addition to serving as the internal champion for the project and representing your interests with the vendor, the ERP Leader is responsible for delivering the following critical elements of successful implementations:

- Formal project governance cadence and stakeholder management
- Deep understanding of business requirements and alignment with system design
- Detailed and actionable project plans with clearly-defined critical path
- Ongoing risk, issue, and decision tracking with timely escalations as needed to ensure timelines are met
- Data migration and user acceptance testing leadership
- Execution of deployment and early-life support models



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# Expertise In Action

## Select ERP Transformation & Technology Clients



ERP IMPLEMENTATION  
LEADERSHIP

Private Equity Fund:  
Alpine Investors



TECHNOLOGY-ENABLED  
BUSINESS TRANSFORMATION

Private Equity Fund:  
Trilantic



FULL-SUITE SAGE  
INTACCT IMPLEMENTATION

Private Equity Fund:  
Kohlberg & Company



INTERIM IT LEADERSHIP & ERP  
IMPLEMENTATION LEADERSHIP

Private Equity Fund:  
Palladium Equity Partners



SYSTEM SELECTION & ERP  
IMPLEMENTATION LEADERSHIP

Private Equity Fund:  
Wind Point Partners



INTERIM IT LEADERSHIP &  
ACQUISITION INTEGRATION

Private Equity Fund:  
Health Enterprise Partners



## Case Study

### INTERIM IT LEADERSHIP DURING AN EXIT PROCESS

**INDUSTRY:** Food & Bev Manufacturing

**SERVICE:** Interim IT Leadership

**REVENUE:** \$125M

**ISSUE:** A rapidly-growing food manufacturer was experiencing significant growth and needed immediate assistance with IT operations during a transaction. The Company was expecting several inbound diligence requests, and during this time, the IT Director provided notice of his intent to leave the Company.

**SOLUTION:** CBIZ Private Equity Advisory provided interim IT Leadership services and support to the Company to achieve the following objectives:

- Provided operational stability for the technology environment and leadership for the IT team during a time of transition
- Responded in a timely manner to diligence requests
- Provided ongoing IT leadership, managing the project portfolio and identifying technical and operational improvements until a permanent hire was onboarded

**OUTCOME:** Successfully provided interim IT leadership services to improve support effectiveness, project delivery, and overall technology processes. As a result of the engagement, the Company was able to:

- Detail a path forward project portfolio to support Company growth and improve efficiencies
- Successfully onboard and transition responsibilities to new IT leader
- Enhance overall technology processes to allow for innovation and prepare for future growth