



SDI Presence LLC
 6829 Fair Oaks Blvd, Suite 100
 Carmichael, CA 95608
 916.692.2000

A Certified Minority Business
 Enterprise (MBE)

ERP



OUR EXPERTISE

SDI offers our clients a proven enterprise resources planning (ERP) procurement methodology designed to meet the unique needs of municipalities. SDI continually reviews and updates our knowledge base to take advantage of our collective ERP experience to improve and refine our ERP procurement services. Our clients directly benefit from focus on continuous improvement as we share our experience, methodology, and tools with our clients.

SDI's ERP procurement methodology includes the following five-phases:

PHASES AND TASKS

DELIVERABLES

| PHASES AND TASKS | DELIVERABLES |
|---|---|
| PHASE 1 INITIATE <ul style="list-style-type: none"> 1.1 — Project Sponsor Planning Meeting 1.2 — Work Plan Development 1.3 — Kickoff Meeting | <ul style="list-style-type: none"> • Work Plan • Kickoff Meeting Presentation |
| PHASE 2 REQUIREMENTS <ul style="list-style-type: none"> 2.1 — Request and Review Documentation 2.2 — Conduct System Requirements Workshops 2.3 — Document Functional and Operational Requirements 2.4 — Document Interfaces and Technical Requirements 2.5 — Document Data Conversion Requirements 2.6 — Complete ERP Needs Assessment Report | <ul style="list-style-type: none"> • Documentation Request Listing • Functional and Operational Requirements Inventory • Interface and Technical Requirements Inventory • Data Conversion Requirements Inventory • Draft and Final ERP Needs Assessment Report |
| PHASE 3 RFP <ul style="list-style-type: none"> 3.1 — Prepare Draft Request For Proposal (RFP) 3.2 — Review Draft RFP With Stakeholders 3.3 — Identify and Notify Potential Bidders 3.4 — Release RFP | <ul style="list-style-type: none"> • Draft Request for Proposal • Final Request for Proposal • Vendor Listing and Contact Information |
| PHASE 4 SELECT <ul style="list-style-type: none"> 4.1 — Address Vendor Questions 4.2 — Prepare Evaluation Committee 4.3 — Conduct Initial Screening of Proposals 4.4 — Assist with Review and Scoring of Proposals 4.5 — Prepare for Proof of Capabilities (POC) Sessions 4.6 — Facilitate POC Sessions 4.7 — Assist With Completion of Finalist(s) Due Diligence 4.8 — Prepare Vendor Selection Report | <ul style="list-style-type: none"> • Vendor Question Responses • Evaluation Scoring Methodology and Matrix Template • Evaluation Scoring Matrix Summary • POC Session Agenda and Scripts • Vendor Selection Report |
| PHASE 5 NEGOTIATE <ul style="list-style-type: none"> 5.1 — Research Prior Vendor Agreements 5.2 — Conduct Initial Agreement Review 5.3 — Facilitate Negotiation Strategy Workshop 5.4 — Conduct Negotiation Meetings 5.5 — Obtain City Council Approval | <ul style="list-style-type: none"> • Final Agreements with Vendor • City Council Meeting Participation |

Contact Scott Sanders at ssanders@sdipresence.com/530-598-4915 to learn more about how SDI can assist with your ERP procurement services.