A Guide to Selecting the Right ERP Partner

An Epicor White Paper

EPICOR

Executive Summary

Although a challenging economy has caused many organizations to reduce overall IT spending, several continue to invest in enterprise resource planning (ERP) systems. Such systems enable organizations to reduce costs, improve customer response time, become easier for customers to do business with and manage growth expectations. Additionally, in an era of increasing globalization, organizations are challenged with streamlining their supply chains, becoming more demand driven, bringing new products to market faster, and complying with greater regulation. These organizations understand that ERP systems provide a single version of the truth that enables the visibility and transparency necessary to improve decisions and business processes to meet today's most challenging business requirements.

As organizations determine their ERP strategy, however, they need to choose the right ERP vendor partner. This white paper explores the plusses and minuses of the four types of ERP partners: Partner ecosystems, frameworks, best-of-breed packages and end-to-end integrated solutions. Only with the right ERP partner can organizations ensure that they obtain the functionality that drives competitive advantage for the optimal total cost of ownership.

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In Today's Economy, the Right ERP is More Important than Ever

Despite a challenging economy and a corresponding reduction in IT spending, organizations continue to invest in enterprise resource planning (ERP) solutions. While Forrester Research® predicts that global businesses and governments will lower their overall purchases of IT goods and services by three percent in 2009, it projects that software investment will remain at 2008 levels.[1] A 2009 CIO survey by Gartner Executive Programs (EXP)[2] reported similar findings, adding that ERP investments will remain critical. The report explained that "CIOs are expected to invest in business intelligence applications and information consolidation in order to raise enterprise visibility and transparency, particularly around sales and operational performance. Investing in ERP technologies, a focus that reflects ERP's core position in enterprise operations, will continue."

Among the factors driving this investment, a recent Aberdeen Group survey of SMBs found[3], were the need to reduce costs (44 percent of respondents), improve customer response time (41 percent), become easier for customers to do business with (34%) and manage growth expectations (33 percent).

Globalization has also been a critical factor driving this demand among companies of all sizes for the last several years. Two years ago, AMR reported that,[4] "Globalization is causing many organizations to transform their traditional, forecast-based, push supply chains into broader, end-to-end demand driven supplier networks. Instead of a linear supply chain, organizations now have complex supply networks of suppliers, co-packers, outsourced manufacturers, retailers and distributors that must operate in concert to respond to customer demands."

These pressures have long been forcing organizations to reshape their business processes. These new processes generally require support from IT—particularly ERP systems. The 2007 AMR study says that modern ERP applications, configured with industry-specific functionality, localizations or both are able to break down barriers between departments within a company. These applications can bring the various parts of the organization together with a single, consistent version of the truth that will allow the company to operate in a more agile and predictive fashion.

These requirements have only gained importance over the past few years. A 2009 report by Gartner, Inc.[5] notes that, "The next wave of globalization demands that organizations move from simply having a presence globally to gaining competitive advantage from global scale. This is heavily dependent on initial process and information standardization, and makes the coordination of systems and instances, and the issues of high-data quality, more urgent than before."

[1] "Global IT purchases will decline in '09" By Liam Lahey, January 29, 2009, connectIT
[2] Ibid
[3] "Measuring the ROI of ERP in SMB: Keeping ERP Projects Alive When You Need Them the Most," by Cindy Jutras, Aberdeen Group, March 2009
[4] "ERP Providers Serving the Midmarket," By Simon Jacobsen, AMR Research, 2007 Technology and Vendor Landscape Series
[5] "Key Issues for ERP, 2009," Gartner, March 23, 2009

In addition to addressing business drivers, many organizations are finding that the legacy ERP systems in use by many midsized companies, according to Forrester[6], are unable to meet today's requirements.These ERP systems:

- Lack out-of-the box vertical customizations
- Are unable to interoperate with other applications
- Do not support collaboration with customers and partners
- Do not provide easy-to-use "point-and-click" environments that younger workers demand
- Are unable to easily support new business processes without expensive customizations

These organizations are replacing their outdated systems to gain the IT support they need to operate more efficiently and effectively in today's global economy.

Many larger companies that have grown by acquisition now run multiple ERP applications. These companies are looking to standardize their ERP systems across divisions to improve process efficiency and reduce internal support costs. [7]

As these organizations replace or consolidate their ERP systems, they need to work with the right partner to achieve the optimal solution.

Comparing Four Types of ERP Vendor Partners

Organizations can typically choose from four principle types of ERP vendor partners who deliver solutions around the following models:

- Partner ecosystems
- Frameworks
- Integrated best-of-breed
- End-to-end embedded solutions

The following sections describe the plusses and minuses of each type of solution in terms of choices, functionality, total cost of ownership, and other critical factors.

[6] "Competition Intensifies for the SMB ERP Customer" By R "Ray" Wang, Forrester Research, August 13, 2007
[7] "ERP Applications 2008: The Battle Goes Vertical", Forester Research, June 23, 2008 by Paul D. Hamerman

Partner Ecosystems

Some vendors offer ERP solutions that provide basic horizontal functionality that can be used to support many industries. They then rely on partners to develop industry-specific functionality on top of their core products. The more significant of these vendors have developer partners that number in the thousands across dozens of locations and countries. To support their partners, these vendors may certify partner applications, provide eLearning and training resources, and create online communities where partners can network, share best practices and market their offerings.

Advantages

Partner ecosystems offer customers a number of advantages:

A broad selection of industry-specific solutions – An ecosystem with a large number of partners can fill in the blank spaces in the vendors' application, provide diversified industry and sub-industry-specific customizations as well as meet specific requirements for a wide range of locations, customer sizes and geographic concerns. Indeed, according to Forrester[8], "Each of the large software vendors now has a vast partner ecosystem filled with solutions at varying levels of integration, support, and quality.

Open for integration – Support for integration of partner add-ons through application programming interfaces (API) simplifies integration of partner and third party solutions.

Low cost, rapid implementation – Partner ecosystem solutions are less expensive and time consuming to implement than large, framework-based ERP solutions because they are pre-built add-ons that offer a specific solution to a problem. According to Panorama Consulting, Tier 1 ERPs cost $9 to $13 million more and take two to three months longer to implement.[9]

Disadvantages

At the same time, a partner ecosystem has a number of disadvantages that include:

Confusing partner ecosystems – Forrester Research[10] found that as organizations evaluate various partner solutions within vendor-led ecosystems, many are confused about how to select the right solution from the right partner. Indeed, Forrester describes the situation as a "wild west environment for partner solutions that forces many business process and applications professionals into a caveat emptor situation." The Forrester attributes this confusion to the following:

[8] "Trends 2009" Enterprise Applications/ERP: Application Strategies Evolve for Leaner Sustainability," by R "Ray" Wang and Paul D. Hamerman, Forrester Research, February 13, 2009
[9] "2008 ERP Report, Part II: Comparing Leading Tier 1 and Tier II ERP Solutions," Panorama Consulting
[10] "How to Select a Software Partner Solution Offering" by R"Ray" Wang, Forrester Research, September 3, 2008

- Partner expertise lacks third party validation. End users expect vendors to provide guidance on solution deployment, support partners' solutions through upgrades and coordinate testing of solutions. Yet this support is not always forthcoming.
- Partner program definitions vary greatly from program to program.
- Partner catalogs containing user generated ratings, program details, customer references and online user communities remain meager.

Multiple sources of systems and support – Many midmarket (and even large) organizations prefer a single source for most of their business systems and supporting services. Yet, with a partner ecosystem, customers must deal with multiple solutions providers to meet their business needs and vertical industry requirements. This can create complex IT systems that are more difficult to support and upgrade than a comprehensive solution from a single vendor.

Questionable viability of partners – Many partners in the ecosystem may be small, which means that not all will remain viable over the long run. Aberdeen Group[11] recommends that companies seeking work with a partner from an ecosystem know what they're getting into: "If considering an extension from a vendor other than your ERP solution provider, understand the nature and terms of the alliance, cooperative marketing arrangements are very easy to form and just as easy to walk away from. Not all partnerships are made in heaven and they don't always last forever. Consider the impact a change in partnership status might have on your ongoing production environment."

Aberdeen also recommends that companies protect themselves as follows: "Perform financial due diligence on potential providers, particularly small partners to your ERP provider and put together escrow agreements whereby the application source code can be released to your company should certain performance or corporate events (such as an M&A, bankruptcy filing, or dissolution of a partnership) occur. With such an agreement, companies can bring the code in house to continue operations and assess whether to switch to another provider or self maintain the application and/or interface."

Customer-specific – Many partner add-ons that appear in the ecosystem were created to address the issues of a specific customer and therefore do not always represent best practices as much as a specific customer's practices.

Uneven quality – Partner add-ons are frequently not built to same standards as the ERP vendor's baseline product since they may not use the same approach to product development or quality assurance.

[11] "Best Practices in Extending ERP: A Buyer's Guide to ERP Versus Best of Breed Decisions," Aberdeen Group, November 2006

Inconsistent versioning – Versions of products often change (on both sides) necessitating upgrades and certification/re-certification. The partners, which are typically smaller companies, are not always able to keep up with the pace of development of the ERP vendor and may lag behind on version support. This can hold a customer back from adopting new and necessary baseline functionality. Additionally, the partner's development schedule may not correspond to that of the ERP vendor, requiring additional administrative attention and update/release management.

Frameworks

A number of larger ERP vendors offer business applications that are built upon and take advantage of their own application frameworks, which often provide a foundation for all the organizations' applications. Today, these frameworks can include: The database, application servers, and a SOA-based middleware layer with enterprise service bus for messaging between applications and components. Business process management (BPM), application development, and composition layers enable customers to bolt together software applications and components as well as manage business rules to create cross-functional applications and business processes. These vendors are even introducing vertical specific scenarios that furnish end-to-end business processes, such as collaborative demand and supply planning.

These platforms generally enable interoperability between the vendors own applications and modules and third party applications so all of the organizations' applications can work together.

Several Framework ERP vendors sell the technology platform itself, including the database and middleware technology. Indeed, platform technology remains the largest business for some of these vendors, who also offer their own application suites comprised of both acquired applications and applications developed in house. In addition, these vendors also develop and take advantage of partner ecosystems.

Advantages

Framework ERP vendors claim that their platform approach offers the following advantages:

A unified enterprise architecture – An approach that incorporates both applications and infrastructure is designed to lower IT costs through an enterprise architecture that:

- Is more flexible
- Is better integrated with applications
- Supports open standards to enable future interoperability and broad integration
- Offers substantial innovation. Many of these vendors are moving toward providing "dynamic applications" that incorporate four key technologies: (1) content and collaboration, (2) business process management, (3) SOA, and (4) business intelligence. Combining these technologies will enable applications to exhibit the following characteristics: User centricity, process orientation, flexibility, content and collaboration, and information-richness

- **A broad range of vertical offerings –** The Framework ERP vendors offer a broad range of vertical offerings that include their own application suites as well as solutions acquired from other vendors and provided through the partner ecosystem.
- **Purpose-built solution –** A real advantage of the Framework vendors is their provision of a platform on which to create a purpose-built solution that meets customer requirements from the ground up.

Disadvantages

Framework ERP vendor solutions also offer substantial disadvantages:

Customer control and lock in – While the Framework ERP vendors offer some support for open and de facto standards, their applications typically require proprietary business process platforms, databases and/or middleware, a trend which is not expected to change anytime soon.[12]. These companies try to take control of their customers by requiring them to deploy large, costly technology platforms and convince customers to use only solutions that are certified on their proprietary vendor platforms.

For customers, this means:

- These vendors impose new technology investments every few years that are dictated by the vendor's artificial product obsolescence. For example, Forrester[13] noted that, "In 2008, 21 percent of companies (were) going through major upgrades of their ERP environment and the same percentage of companies (were) going through minor upgrades. To a large extent, these upgrades (were) driven by vendor imposed support deadlines where customers faced increasing maintenance costs or decommissioning of specific releases if they further delay upgrading."
- Customers risk getting locked out of innovations in the new world of SOA.
- Customers may be required to adopt technologies for which they are not ready. The adoption of cloud computing, for example, is having increasing appeal to enterprises intent on innovating while preserving cash. However, according to Gartner, "With the upfront benefits in choice, value and predictability come new ownership risks that application delivery professionals and business stakeholders should explore.[14]"

Extensive development – Framework ERP vendors are typically focused on enterprise-sized businesses, often referred to as the Tier-1 sector. And, although these ERP solutions are often pre-packaged and come with pre-designed best practices for specific business functions, the real value-add of the Framework vendor is to help a customer achieve a purpose-built solution that gives a business its edge. Therefore, Framework ERP systems typically support specialized processes that enable businesses differentiation via extensive consulting engagements and customization of software. Yet this level of customization leads to high implementation and upgrade costs.

[12] "Key Issues for ERP, 2009" By Christian Hestermann, Gartner Research, March 23, 2009
[13] "ERP Applications 2008: The Battle Goes Vertical, Forester Research, June 23, 2008 by Paul D. Hamerman
[14] "Key Issues for ERP, 2009" By Christian Hestermann, Gartner Research, March 23, 2009

Long implementation cycles – As a result of the potential for a "purpose-built solution," complexity of ERP framework implementation, and the need for customizations, implementations for ERP frameworks can take substantially longer than other types of ERP applications. According to Panorama Consulting, ERP implementations can last anywhere from four to 60 months, with 71 percent taking between six and 10 months.[15]

High total cost of ownership – Upgrade costs, vendor maintenance fees, additional license fees and operating costs (staff and IT infrastructure) contribute to high total costs of ownership for Tier 1 solutions. License fees represent a significant cost item, not only because of new functionality but also because vendors often assess additional fees for increased use of their products. Support costs are compounded by the complicated software and hardware infrastructures required to support the leading enterprise applications and the cost of highly skilled staff necessary to keep them running.

Difficult to use – Traditionally, ERP framework-based applications have been difficult to use, requiring well trained users to navigate complex menus and work flows. Even the newer ERP packages offer only minor usability improvements of a rather cosmetic nature.

Focus on the framework – Unlike other vendor types that focus primarily on applications, the Framework vendors offer far more than business applications, which often end up taking a back seat to the more lucrative database and middle ware offerings. Because framework vendors are interested in signing up businesses to their entire stack, they may lose focus on the ERP itself.

Best-of-Breed

Some ERP vendors have built and/or acquired a wide range of point solutions, often referred to as "best-of-breed" offerings, which meet different business challenges. These vendors then work to integrate all of these applications often (but not always) using the service-enabled capabilities of a service-oriented architecture (SOA) layer that support diverse technology standards, such as Java™, IBM® MQSeries® and Microsoft® .NET. Each application operates and evolves independently and the vendor works to ensure that they all work together.

Advantages

These best-of-breed ERP solutions have several advantages:

Solution Expertise – Best-of-breed solutions can address a wide range of specific business challenges. Deep vertical expertise embodied in each of these solutions often yields competitive advantage against more generalized ERP vendors. Moreover, customers want proven solutions with years of experience behind them, even if these solutions are offered as add-ons from the vendor rather than from a third party.

[15] "2008 ERP Report, Part II: Comparing Tier 1 and Tier II ERP Solutions," Panorama Consulting Group

Lower cost, faster implementation – Because best-of-breed vendors provide access to numerous point or vertical solutions through a common integration platform, customers can deploy solutions much faster with less cost than they could by integrating a third party offering. Best-of-breed vendors aim to build service-enabled capabilities into all major product lines that become available as part of standard product upgrades and maintenance services. Customers need not undertake a large software reimplementation that may require replacing existing solutions that meet current and near-term requirements. This means customers can achieve interoperability between existing and new solutions with much less development effort and disruption.

Standards-based integration – The use of a standards-based SOA with all the products gives customers choice and control. By supporting multiple platforms and individual applications that can continue to run as they do today, standards-based SOA makes changes transparent to the end user.

Less rigorous upgrade requirements – Unlike ERP frameworks, best-of-breed applications do not typically force customers to upgrade by stopping their support for older versions of their products, according to a January 2009 report by the Gartner Group.[16]

Disadvantages

Best of breed solutions have the following disadvantages:

No common user interface – Typically, different best-of-breed applications, which have been assembled by the vendor through acquisition or separate unconnected development initiatives, use their own user interface. This increases training expenses for organizations that employ multiple best-of-breed applications and can have a negative effect on user productivity and business performance. Recently, some best-of-breed vendors have begun introducing role-based portals that help make the products more user-centric by providing a common interface that allows users to drill down and enter the underlying transactional systems. However, these efforts are still in their early stages and rarely cover all of the best-of-breed vendors' offerings or functionality.

Mixed technologies – Many best-of-breed vendors establish their portfolios through acquisition and are therefore able to offer significant choice in terms of capabilities. However, these solutions are often based on differing technologies, which can cause additional cost and complexity and result in the need for customers to invest in internal skill-sets in many areas. Even when multiple applications are developed on the same platform, they may not use the same versions of the technology, which can lead to technical conflicts during and after implementation.

Higher administrative costs – Administrators need to learn multiple applications since best-of-breed applications have different structures, reducing productivity and increasing maintenance costs.

[16] "Inforum 2008: The Infor Brand Emerges?" By Thomas Otter, Chris Pang, Robert P. Anderson, Christian Hestermann, Gartner Research, January 14, 2009

Limited use of SOA–Many best-of-breed vendors have yet to adopt SOA techniques or deliver them standard across all their offerings. This can cause additional levels of cost and complexity, requiring customers to become familiar with differing enterprise application integration (EAI) approaches to integrate applications.

Difficulty in maintaining a single version of the truth – Often in a best-of-breed environment, underlying systems have been bolted together, which can create the need to synchronize and update two or more existing master files under the covers. For example, the core ERP system may maintain one customer master schema and the add-on best-of-breed CRM offering another, which must be kept in synch. This can lead to an increased level of IT and administrative complexity, as well as concerns about data stewardship and accuracy.

Delays between releases – When the larger best-of-breed vendors, which offer broad portfolios of applications, update an application for a new release, they must ensure that they update and certify all integrations to other applications at the same time. This does not always happen.

Lack of focus and innovation – Best-of-breed vendors often come under criticism for buying up products and customer bases and then living off the maintenance streams. Few best-of-breed vendors have strategic product lines. Instead they spread their focus across their broad portfolios. As a result, a large investment in R&D does not always translate into a large investment in each product line.

Confusing product road maps – While many of the best-of-breed vendors are in the process of SOA-enabling their applications and improving their user interfaces, it will take awhile to incorporate these capabilities into all of their applications. Thus, it is not enough for customers to understand their vendors' broad roadmap. They must be clear on when the vendor will upgrade their particular applications because not all products will benefit at the same time.[17]

End-to-End, Embedded Solutions

End-to-end embedded solutions offer a wide range of business-specific applications that integrate seamlessly because they are usually built from the ground up using a service-oriented approach. Because all of the applications are developed by the same vendor, they have the same underlying architecture, use a single schema, and have the same look-and-feel for end users and system administrators.

Advantages

End-to-end embedded ERP solutions offer the following advantages:

Industry-specific solutions – These solutions offer end-to-end industry-specific solutions.

[17] "Inforum 2008: The Infor Brand Emerges?" By Thomas Otter, Chris Pang, Robert P. Anderson, Christian Hestermann, Gartner Research, January 14, 2009

Embedded equals seamless integration – The modules within these packages are embedded, rather than integrated. This means customers are not required to piece together disparate system as key capabilities are delivered as part of the system. Customers are far better served by this approach because it delivers a "single version of the truth" that makes it easier to keep data in synch. It also means that rather than having to put customers' maintenance dollars toward keeping tables in synch, they can fund new business functionality to address customers' business challenges and opportunities.

Consistent user interface – Because a single vendor develops all of the modules in the same code line, they all use a single, consistent user interface, which reduces training costs and promotes user productivity. In addition, modern end-to-end embedded solutions provide consistent Web and Windows Smart Client access to allow users to easily access information from wherever and whenever they need it.

Less expensive, shorter implementation – According to Panorama Research, implementations cost $9 to $13 million less than ERP frameworks and take two to three months less time. This is because the end-to-end embedded vendor provides a pre-packaged a set of (often industry-specific) processes into a single code line that can be deployed rapidly in order to deliver rapid ROI. In contrast, Framework vendors need to build a solution for each customer.

Dynamic applications – Because the application comes from a single vendor, it is easier to incorporate the latest dynamic application technologies such as enterprise search, presence and real time communication. This means that applications are more user-centric (e.g. they employ workspaces customized to their current needs), more collaborative (e.g. information can be deployed and collaborated upon across many mediums), dynamic (e.g. they can be modified without programmers), information rich (e.g. providing all necessary information necessary to make decisions and take action in one place) and process-centric (e.g. allowing businesses to proactively engage users in business processes).

Cross-departmental processes – Because embedded vendors start with a consistent product from end-to-end, they are better able to focus on industry-specific processes on behalf of their customers. Because these solutions take an SOA approach, actual business processes can be managed and manipulated at a business level, rather than require extensive integration. This enables customer to support their operations by modeling their business using business process management (BPM) capabilities, business rules, events, policies and workflows without the need for customization.

A single point of accountability – With one vendor, customers facing any challenges with their application know exactly who to go to. With this single point of accountability, customers gain a rapid return on investment and reduce their total cost of ownership.

Disadvantages

Disadvantages of the end-to-end embedded approach include the following:

A single technology – Typically end-to-end embedded vendors are able to provide these benefits because they build their solutions on a specific technology platform. While this makes the vendor more productive and provides consistency for the customer, it can rule out the vendor for customers who may have a policy to standardize on a different technology platform. However, even in these cases, it is more and more common to see businesses making ERP selections based on business need as opposed to technical approach as long as the ERP uses a commonly deployed and supported platform, such as Microsoft .NET.

Fewer applications – Although end-to-end embedded vendors score high because their functionality employs a single consistent code line and they manage each release, these vendors may be unable to match the add-on functionality that the ecosystem or best-of-breed vendors are able to provide. Customers must therefore understand exactly what they need from their vendor and become comfortable with the vendor's product strategy for new development. Many end-to-end vendors also offer a standards-based approach, such as SOA, that simplifies the integration of key third party products, if necessary.

Conclusion

Each of these types of ERP partners offer advantages and disadvantages that can impact the suitability of their ERP solution to business objectives.

Partner ecosystems offer a broad range of vertical and specialized solutions. However, it can be difficult and confusing to find the right partner, some partners may not be viable over the long term, and customers can find themselves with multiple providers of systems and support, which can prove difficult to manage, particularly on a global basis.

Major vendors who offer ERP Frameworks offer highly flexible, integrated and innovative solutions. Yet, customers can easily be locked into the vendor's technology, which means greater costs due to mandatory upgrades, and customers may be required to adopt technologies for which they are not ready. Framework ERP vendors' products often require extensive customization and implementation consulting in order to make the most of the flexibility these platforms offer, which can lead to long and costly implementations. In many cases, these vendors invest less in their user interfaces than their database and middleware, which means they can be difficult to learn and use. All in all, the total cost of ownership for these purpose built solutions, which includes license fees (application, database, middleware), maintenance and support can be substantially higher than for other vendor types.

Best-of-breed solutions often offer the functional point solution or industry-specific functionality that can deliver a competitive advantage at a lower cost and with relatively rapid implementation. However, these solutions can be plagued with non-standard user interfaces and require administrators to learn different structures for different applications leading to higher costs. Moreover, upgrades to promised modern, standardized user interfaces and standards based SOA foundations will become available at different times for different products. This means that not all customers can equally benefit from enhanced interfaces and integration.

End-to-end embedded solutions offer most of the advantages of these other solutions, with few of the disadvantages. They provide industry-specific solutions with seamless integration. Implementation times are shorter and less expensive than solutions from the Framework ERP vendors. Users can take advantage of a single look-and-feel and role-based user interfaces for all of their applications, which minimizes training; administrators can reduce their learning curve because applications use a single underlying SOA-based structure. Because these solutions come from a single vendor, they can more quickly and easily incorporate the latest dynamic application technologies. And most important, customers facing any challenges with their application have a single point-of-accountability to resolve their issues quickly.

About Epicor

Epicor Software is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in over 150 countries, Epicor provides integrated ERP, CRM, SCM and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability. Founded in 1984, Epicor celebrates 25 years of technology innovation delivering business solutions that provide the scalability and flexibility businesses need to build competitive advantage. Epicor provides a comprehensive range of services with a single point of accountability that promotes rapid return on investment and low total cost of ownership, whether operating business on a local, regional or global scale. The Company's worldwide headquarters are located in Irvine, California, with offices and affiliates around the world. For more information, visit www.epicor.com.

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