

ERP Business Case & Justification

Consulting Engagement Proposal

Prepared for:

Williamson County | [REDACTED]



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Our Understanding of Williamson County's ERP Situation...

- The County currently uses Oracle EBS, on-premise, ERP version 12.2
 - The ERP has been in use at the county since ~2004
 - Fully integrated Payroll-HRMS, Financials (GL-Costing, Grants Projects, Accounts Receivables, Payables, Fixed Assets), Purchasing, Employee and Manager Self Service functionalities
 - The system is stable and well personalized to suit the county's needs and has many integrations into other major enterprise-wide systems
 - The County regularly upgrade, patch and help secure the system routinely – via frequent patching sessions throughout the year
 - The County is on Extended Support on the current legacy version – extended supports extends until 2030
- One of the primary challenges is the complicated licensing imposed by Oracle and finding support from licensing re-seller (Mythics)
- As end of extended support approaches, it becomes necessary to start RFP process for a suitable solution to replace the existing ERP. The County would also like to take this opportunity to simplify further and move to a cloud solution

...Our Lens on How Gartner Will Help

- We have deep expertise in assisting our clients with ERP Application Modernization – and have a well-defined approach. Given the current state of Williamson County's ERP, this standard approach provides a straight-forward path to meet the County's needs.
- Produce a business justification for the modernization of Williamson County's existing ERP through the following approach:
 - **Step 1: Establishing the strategic context**
 - **Step 2: Analyzing business capabilities**
 - **Step 3: Articulate business justification**
- Included in the business justification effort is the importance of clearly communicating with the County's stakeholders the future of Williamson County's ERP and support systems.

Investment Summary – Fees, Expenses, & Billing

- Gartner will conduct the engagement outlined in this SOW for a **deliverables-based, firm-fixed price of \$125,000.00** inclusive of travel and other reimbursable expenses
- Project Billing will occur based upon the completion of the deliverables listed at right:

Step	Deliverables	Amount
0	Kickoff Materials	\$10,000.00
1	Initial Business Capability Model	\$25,000.00
1	Business Context Report	\$20,000.00
3	Justification for Change	\$40,000.00
3	Executive Summary Report	\$30,000.00
Total		\$125,000.00

- Invoicing:
 - All invoices are payable net 30 days from the date of invoice. While we do not itemize billing for services, we agree and will comply with any reasonable requests for records substantiating our invoices.
 - If Williamson County requires a purchase order (PO) number, please specify the PO number in the Authorization section and forward a copy of the PO, with this agreement, to name/address or fax of the appropriate individual. Ensure that the PO includes all labor and travel expenses quoted in this SOW. Any pre-printed terms on the PO that are in addition to or in contradiction of the terms of this agreement shall be inapplicable

Authorization

- This proposal is submitted subject to and in accordance with the terms and conditions of the Texas Department of Information Services (DIR) Deliverables-Based IT Services (DBITS) contract with an effective date of January 21, 2022.
- When signed by Gartner, Inc. and Williamson County, this Proposal/SOW is an attachment to and governed by Contract Number DIR-CPO-4927. These two documents will set forth the relationship between the parties for this engagement. This SOW may be modified at any time provided such changes (i) are agreed by the parties in writing and (ii) where applicable, are in accordance with the Change Order provision
- The Proposal, including the SOW, is valid for 30 days from 10 May, 2023

IF USING A DIGITAL SIGNATURE, PLEASE CONFIRM THE FOLLOWING AS A CONDITION OF CONTRACT EXECUTION:

☐ By ticking this box, I agree that by affixing my digital signature hereunder I am attesting that: (i) this is my own personal legal signature; and (ii) I am a duly authorized signatory for my company. My signature verifies that the information provided to Gartner hereunder is subscribed by me, under penalty of false Statement and material breach of contract.

SUBMITTED ON BEHALF OF GARTNER, INC.



SIGNATURE
Will Wong, Senior Managing Partner
PRINT NAME AND TITLE
05/10/2023
DATE

AGREED ON BEHALF OF Williamson County



SIGNATURE
Valerie Covey Presiding Officer
PRINT NAME AND TITLE
Jun 6, 2023
DATE
PO NUMBER (If applicable)