ERP Business Case & Justification

Consulting Engagement Proposal

Prepared for:
Williamson County | [redacted]

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Today's Conversation

1	Our Understanding of Williamson County's ERP
2	Gartner's Point of View on ERP Modernization
3	Recommended Approach
4	Detailed Engagement Timeline & Activities
5	Project Resources & Management
6	Assumptions, Investment Summary & Authorization

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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.

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Recent ERP Experience with State & Local Government Organization Across the US

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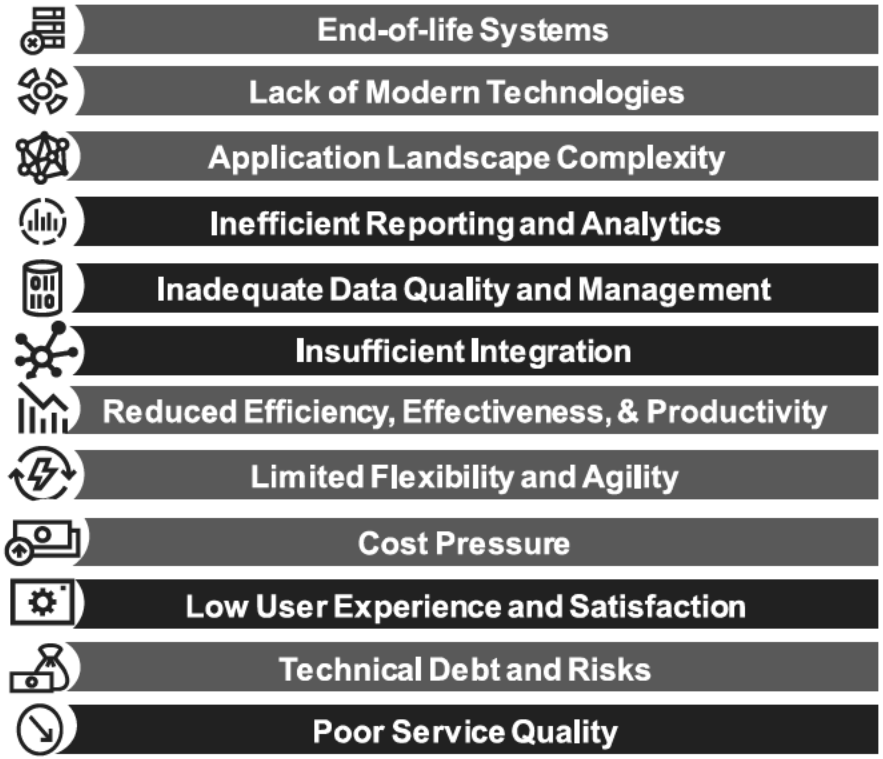
Several Factors should be Considered when Replacing the County's ERP Solution

Organizations running legacy ERP solutions must consider the limitations of those solutions to meet future operating needs when choosing between options

- While replacement of an ERP solution is a major undertaking for any organization, there are times when it is appropriate. Often, replacement only occurs when the **existing legacy ERP system is beyond even extensive renovation—*when operational business risks peak***
- Replacement of an ERP solution is typically driven by a number of different factors:
  - No longer fit-for-purpose
  - Can no longer be supported or adapted to meet basic department needs
  - Has become too costly to operate especially in terms of the manual processes & sub-systems required to make it work or
  - Is technologically obsolete

Typical Drivers for ERP Replacement



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ERP Modernization Business Drivers for Success

A successful ERP strategy is put in place when organizations **focus on the key business drivers that best fit its culture, mission critical priorities, and overarching goals.** Sometimes, depending on the goals and mission, different drivers may be more applicable to each department. The following business driving statements are examples of expected outcomes for Williamson County.

Data Driven Decision Making

Reduce the amount of manual effort required, while increasing the accessible amount and quality of data and preparing the team to make more informed business and technology decisions.

Agility

Prepare the team to optimize new ways of working and technology to drive value and create new ways to operate — using agile principles that will result in faster outcomes, greater ease of decision making and greater user experiences

Efficiency

Gain economies of scale by establishing standard processes, eliminating manual and manual tasks, automating centralized administrative tasks, simplifying localized processes through modern and emerging technologies.

Risk

Minimize redundant processes, manage cybersecurity, mitigate sustainability and support risk while building resiliency to support the mission of the business

Empowering People

Increase process simplicity and user effectiveness through the use of self service, deploying centrally directed, locally executed business processes, and leveraging more accessible and accurate data.

Digital

Enhance the organizational work environment by encouraging the team to embrace innovation and simplicity. Increase educator, staff engagement through effective change management and the optimization of current and future technologies.

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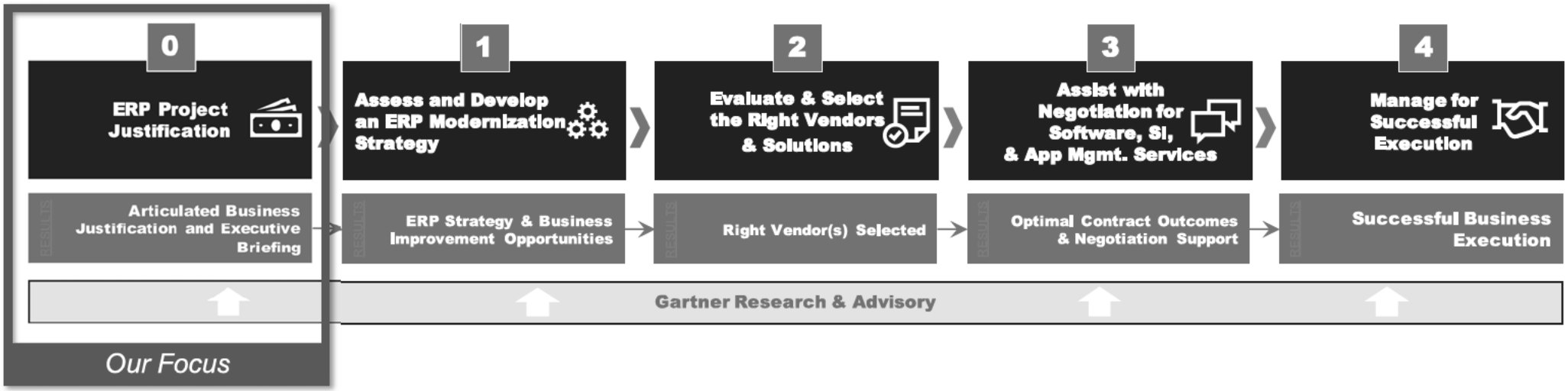
Gartner's 'End-To-End' Approach to ERP Modernization Planning



This customizable methodology results in a comprehensive strategy, identification of business process improvement opportunities, and a roadmap for success

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ERP Project Justification

Activities, deliverables, and duration of the proposed project

Our Focus

Phase 0 – ERP Project Justification

1	2	3
Establish Strategic Context	**Articulate Business Capabilities**	**Articulate Business Justification**
Gartner Activities ▪ Review relevant client information ▪ Establish project governance and identify key stakeholders and business process survey participants ▪ Identify and resolve gaps in requested data/information ▪ Develop and validate initial business capabilities model (BCM) for in-scope areas ▪ Define strategic guiding principles (e.g., governance) ▪ Identify and validate business & technical strategic drivers	**Gartner Activities** ▪ Conduct Interviews to assess business processes and identify improvement opportunities ▪ Identify and articulate potential business & IT benefits (high-level) ▪ Segment BCM based on complexity and extent of needed localization ▪ Provide summary findings to leadership for checkpoint review	**Gartner Activities** ▪ Develop program success criteria for executive communication ▪ Develop Qualitative justification ▪ Estimate vendor-agnostic total cost of ownership (TCO) ▪ Develop Business Justification ▪ Create Executive Summary and assist with read-out to leadership
Deliverables ▪ Kickoff Material ▪ Initial ERP Business Capabilities Model (BCM) ▪ Business Context Report	**Deliverables** ▪ Capability Interview results, including final BCM and summary findings for Leadership review	**Deliverables** ▪ Business Justification ▪ Executive Summary Report

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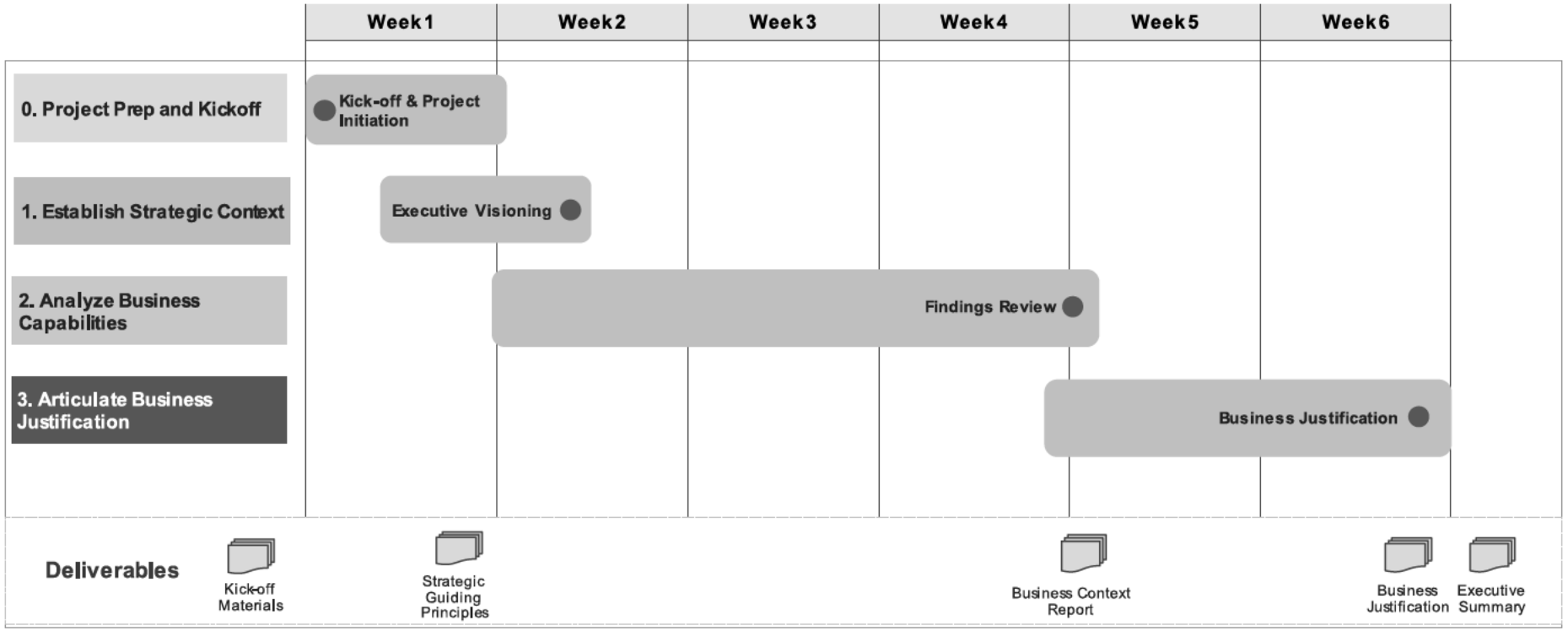
Typical Time-Frame for these Engagements is 6 weeks



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Step 0: Project Preparation

Set the foundation for a successful engagement

Step 0
Step 1
Step 2
Step 3

Objectives

- Work closely with Williamson County (the County) to set the foundation for a successful engagement that is delivered on time, within budget, and meets the County's objectives

Activities Performed by Gartner

- Conduct preplanning meetings to promote understanding of objectives, scope, schedule, roles and responsibilities
- Preview all relevant client information
- Conduct kickoff session with executive stakeholders and Core Team

Williamson County's Responsibilities

- Provide data and take part in Q&A sessions with Gartner Project Team

Deliverable(s) and Work Product(s)

- Project Kick-off
- Project Schedule

Time Frame

- 1 week prior to kickoff

Williamson County's Participants

- Project Manager

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Step 1: Establish Strategic Context

Align scope and priorities to strategic drivers

Step 0
Step 1
Step 2
Step 3

Objectives

- Provide a solid bases for decision-making and prioritization throughout the engagement by promoting alignment of scope and priorities to strategic drivers.

Activities Performed by Gartner

- Review all relevant client information
- Establish project governance and key involved stakeholders
- Conduct interviews with executive stakeholders to understand and document business and IT strategic change drivers and priorities
- Conduct a workshop to define strategic guiding principles (IT support, architecture, sourcing & governance) that will provide guidance Application/ERP Strategy options
- Draft BCM of in-scope functional areas and conduct a validation workshop with identified stakeholders to confirm and update

Williamson County's Responsibilities

- Drive scheduling with the County's resources for interviews and workshops
- Active participation in kickoff meeting, interviews and workshops
- Collaborative participation in BCM development
- Provide required documentation and baseline Cost of Ownership information

Deliverable(s) and Work Product(s)

- Kickoff Material
- Business Context Report that includes:
  - Strategic Guiding Principles
  - Strategic Business and Technical Change Drivers
  - BCM with validated scope

Time Frame

- 1 weeks

Williamson County's Participants

- Project Leadership
- Project Manager
- Project Core Team

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Step 2: Articulate Business Capabilities

Detail in-scope capabilities

Step 0
Step 1
Step 2
Step 3

Objectives

- For in-scope business capabilities, identify differentiating capabilities, gaps, potential improvement opportunities

Activities Performed by Gartner

- Via small group interviews assess business capability & establish maturity & gaps
  - Identify and articulate potential business & IT benefit opportunities
- Explore prioritized opportunities, define differentiating business requirements, and link to deployment options
- Develop a summary output that reflects key findings and directional conclusions. Provide to the County leadership as a checkpoint review

Williamson County's Responsibilities

- Prepare for interviews/work sessions in advance per Gartner guidance and materials
- Active business and IT participation in business capability discussions. Core Team leads responsible for determining level of SME participation
- Drive scheduling with the County's resources for interviews and workshops

Deliverable(s) and Work Product(s)

- Workshop outputs, including summary findings for leadership review-
  - High-level capability maturity
  - Differentiating capabilities
  - Benefit Statements

Time Frame

- 3 weeks

Williamson County's Participants

- Project Leadership
- Project Manager
- Project Core Team

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Step 3: Articulate Business Justification

Communicate the justification for change

Step 0
Step 1
Step 2
Step 3

Objective

- The justification for change is used to articulate and communicate (to operational and executive leadership) the expected benefit opportunities and associated high-level cost expectations to achieve the target Williamson County's ERP architecture over time.

Activities Performed by Gartner

- Bring costs and benefits together and review with the County's Core Team. Promote alignment of recommended initiatives with identified gaps, strategic objectives, business priorities, and expected benefits/outcomes
- Develop an order-of-magnitude estimate. Agree to internal/external staffing, duration, and other cost driver assumptions
- Articulate next steps, as applicable
- Assist the Core Team with presenting/discussing the Executive Summary with the Williamson County leadership

Williamson County's Responsibilities

- Collaborate with Gartner on Executive Summary development and presentation to leadership
- The County's team is responsible for benefit quantification (if necessary)

Deliverable(s) and Work Product(s)

- Justification for Change
  - Benefit opportunities
  - Order-of-magnitude transition and support costs
- Executive Summary Report

Time Frame

- 2 weeks

Williamson County's Participants

- Project Leadership
- Project Manager
- Project Core Team

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The Following Deliverables will be Developed
Description of Deliverables and Work Products

Step	Deliverables	Description
0	**Kickoff Materials**	PowerPoint presentation to communicate and agree to project objectives, schedule, approach, deliverables, and roles.
1	**Initial Business Capability Model**	PowerPoint presentation reflecting the set of business capabilities tailored to the County's context and solution scope.
1	**Business Context Report**	PowerPoint presentation reflecting Strategic Business drivers and guiding principles and specific findings regarding gaps and benefit opportunities. Can be leveraged in subsequent roadmap, business case and selection activities that are outside of the scope of this proposal. Includes summary version for leadership review.
3	**Justification for Change**	PowerPoint presentation that brings together support & transition cost estimates, qualitative and quantitative benefits, and other supporting rationale for the change
3	**Executive Summary Report**	PowerPoint presentation that summarizes for leadership consumptions that clearly articulates the strategic business case and supporting analysis.

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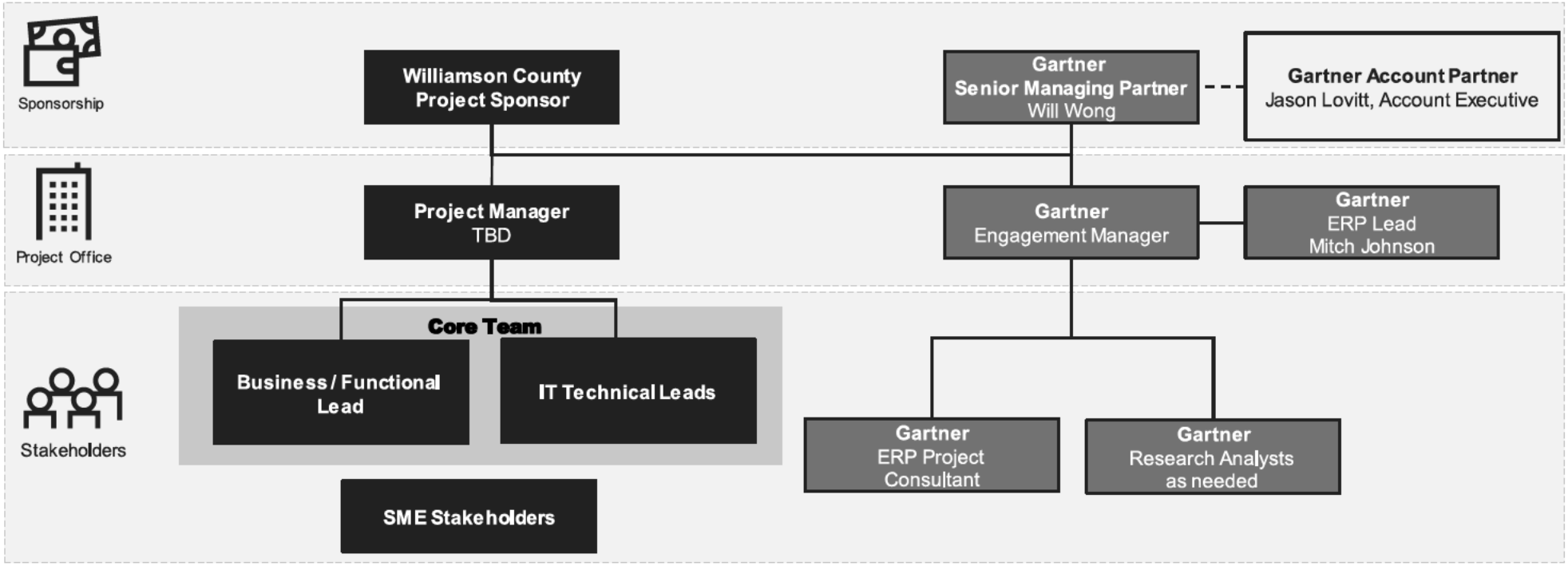
Project Team Overview – Organization Chart

Gartner has created an organization structure for this engagement that promotes high-level sponsorship and quality assurance, strong day-to-day project management, a focused team of project consultants, and deep subject matter expertise.



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Project Team Overview – Gartner Roles & Responsibilities

Functional Role	Responsibilities
Senior Managing Partner	▪ Verify that Gartner activities support the County's goals ▪ Build and maintain a long-standing relationship with the Williamson County ▪ Provide high-level oversight to the engagement and become more heavily involved should any issue resolution be necessary
Engagement Manager	▪ Be responsible for the day-to-day management of engagement initiatives ▪ Ensures that deliverables are completed on time and meet the Gartner quality standards ▪ Act as the primary point of contact for the Gartner team ▪ Work closely with the Williamson County to ensure that Gartner is meeting its needs
Project Consultant(s)	▪ Provide day-to-day consulting support for project steps ▪ Provide support for data collection, data analysis and recommendations for activities ▪ Participate in deliverable creation, deliverable review and client presentations as needed ▪ Present results to the Williamson County as needed
Quality Assurance Specialist	▪ Provide quality assurance review of Gartner project plan and Gartner deliverables throughout the engagement ▪ Promote value through use of the Gartner Project Management Life-cycle
Research Analyst(s)	▪ Support the core project team by providing a context-sensitive perspective to issues specific to the Williamson County based on Gartner industry-leading research ▪ Participate in analysis and comparisons, and review deliverables as needed

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Project Team Overview – Gartner Account Partners

Gartner Account Partners will work closely with the delivery team throughout the engagement:

- Account Executives will ensure that the value delivered through this engagement is seamlessly integrated with all Gartner programs
- Service Partners will provide guidance so that this engagement advances the overall Mission-Critical Priorities of the Williamson County
- The body of Gartner Research and partnership with Analysts will ensure that recommendations and outcomes are aligned with Gartner Research frameworks
- Partnership across this team will ensure that the recommendations from this engagement are actionable through ongoing Gartner services

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Project Team Overview – Williamson County's Roles & Responsibilities

Client Role	% Commitment	Responsibilities
Steering Committee	5%	Responsible body sponsoring the engagement, providing key guiding principles to the engagement teams, assisting in Global Business & IT stakeholders identification and communications, staying abreast of key outputs at major milestones. Proposed group should consist of key/strategic Business and IT executives.
Project Manager	50-60%	Responsible for direct, single-point-of-contact interaction with the Gartner Engagement Manager to ensure that communications, participation, preparation, review, and decision-making activities are efficient and effective. Also responsible for collecting internal required approvals.
Business/Functional Leads	25-30% Peak weeks at 50%	Key/Strategic selected group of Globally selected Business representatives, working on the definition and development of solution and strategy, bringing in key Business and IT SME and Functional Ownership to the engagement. These individuals will be used for defining Business & IT key priorities, identifying present pain-points and prioritizations, feedback and accept of the key deliverables. Active participants in the sourcing effort.
Procurement, Contract, and Legal Representatives	5 – 10%	Responsible for reviewing any RFP bid package(s), communicating with vendors, evaluating proposals and demonstrations, coordinating vendor follow-up and due-diligence, and conducting negotiations and contracting
IT Enterprise App Lead(s)	20-30% Peak weeks at 30%	Responsible for providing application details, working on the definition and development of solution and strategy, contributing inputs to any RFP bid package(s) where applicable. May actively participate in sourcing efforts.
IT Enterprise Arch Lead	25%	Provide full life cycle architecture leadership, working in collaboration, to deploy an optimal Solution that will feature the characteristics such as flexible, scalable, interoperable, secure and leverage out of the box solution capabilities. May actively participate in sourcing efforts as applicable.
IT Security Lead	10%	Responsible for ensuring the safety of clients' or internal products and information. Managing security measures for information technology systems within a networked system. May actively participate in sourcing effort.
IT Infrastructure Lead	10%	Responsible for providing infrastructure details, contributing inputs to any RFP bid package(s). May actively participate in sourcing efforts, as applicable.
Business SMEs	20-30% during workshop weeks	These individuals will be used for defining the Business key priorities, identifying present pain-points and prioritizations, feedback and accept of the key deliverables related with the business activities.
IT SMEs	10-15%	These individuals will be used for defining the IT key priorities, identifying present pain-points and prioritizations, feedback and accept of the key deliverables related with the IT activities.

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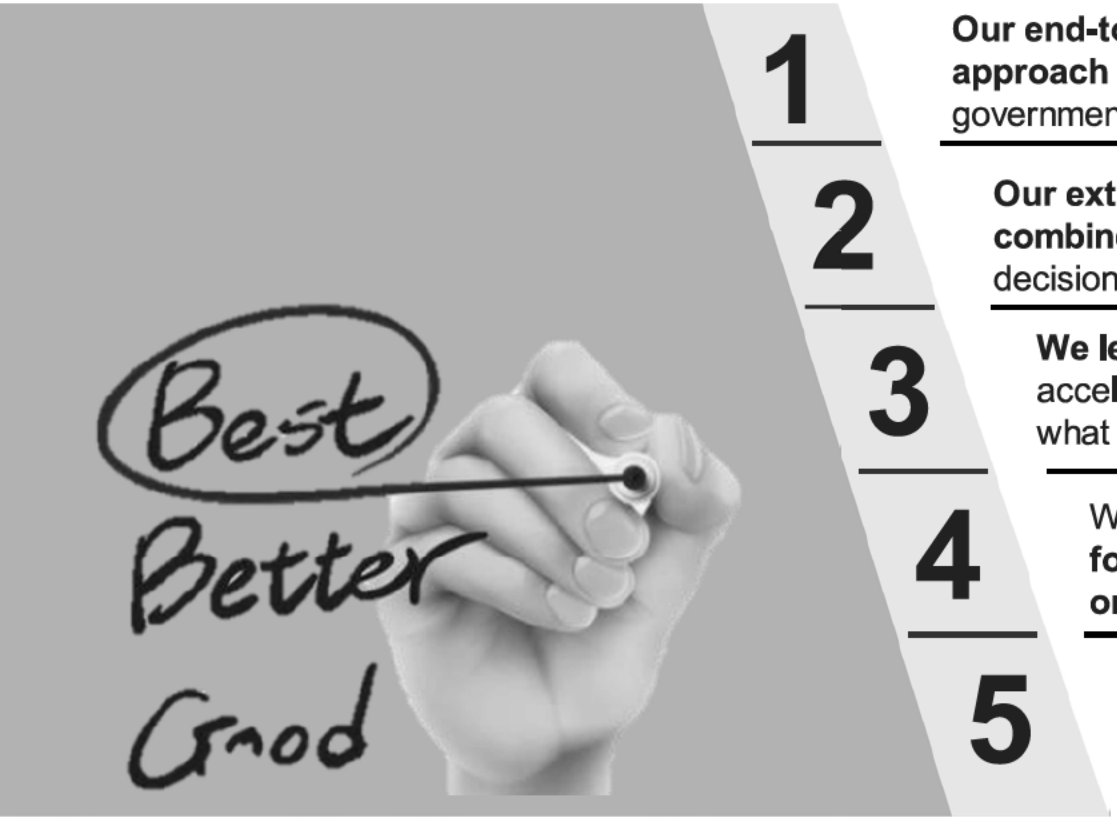
Why Gartner?



1. **Our end-to-end ERP "from-strategy-through-execution" approach track record of engagement success** with local government ERP
2. **Our extensive, proprietary ERP frameworks and data combined with our independence** allows us to make fact-based decisions (e.g., benchmarks, market prices)
3. **We leverage Gartner Research, IP, and best practices to** accelerate project execution. We have extensive knowledge of what other clients have done—and what works and what doesn't
4. We have a team of seasoned **ERP experts who specifically focus on the unique challenges faced by Public Sector organizations** around ERP, HRIS, and Payroll
5. **Our business capability modeling approach** drives clarity and communication by seamlessly linking business and technology outcomes. It is completely vendor, organization, and technology agnostic

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Project Management and Control

A number of crucial activities are accomplished via Gartner's project management process, namely:

Our project management process guides reporting, risk mitigation and engagement control throughout:

- Weekly status meetings by phone to review progress, identify risk , issues and mitigation
- Weekly status report to communicate completed work, forecast planned activities and discuss key issues and risks
- Validation workshop at the end of each phase to ensure alignment on understanding and deliverables
- Gartner will be in constant communication with stakeholders to ensure full awareness of activities, the associated timeline and actions required to ensure efficient control of project change

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Williamson County's Participation

The deliverables, schedule and pricing in this SOW are based on the following assumptions:

- Williamson County will designate a Project Manager to act as the primary point of contact for this engagement. The Williamson County's Project Manager will be expected to work closely with the Gartner employees as needed and will: (a) approve priorities, detailed step plans and schedules; (b) work with the Gartner Project Manager to keep the project on schedule; (c) facilitate the scheduling of Gartner interviews with appropriate client personnel; (d) notify Gartner in writing of any engagement or performance issues; and (e) assist in resolving issues that may arise
- The work effort described in this SOW assumes that Williamson County's personnel are available to assist in the manner defined in this SOW. In the event that the Williamson County' personnel are not available, a change of scope may be necessary
- Williamson County will review and approve documents within five business days. If no formal approval or rejection is received within that time, the deliverable is considered to be accepted by Williamson County
- Williamson County will schedule the County resources for engagement activities and provide meeting facilities as necessary
- Williamson County' personnel will be available per the final project schedule
- Gartner will formally capture feedback on your overall experience via our client survey. This allows us to quantify our performance on this engagement and to ensure a culture of continuous improvement of process and best practice

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Proposal Assumptions – Data Collection & Key Personnel

Data Collection

- The due diligence (as-is) data are reasonably available via interviews and documentation review
- Williamson County (the County) will provide timely access to all appropriate personnel to be interviewed. These personnel will provide the data necessary to complete this engagement, answer questions, provide existing documentation and attend working sessions.
- Engagement pricing is based on the assumption that Gartner will conduct up to:
  - Up to ten (10) discovery interviews/workshops over a period of five days (in week 1/2) and that the County will arrange all sessions with the Williamson County's personnel. Interviews are 30 - 60 minutes in length.
  - Up to four (4) business capability workshops regarding the capabilities within scope over a 2-week elapsed duration. Workshops are 2 - 4 hours in length.
- All data collection and interviews/workshops will take place via telephone or in person at location as described in this SOW and/or as agreed to at the project kickoff

Key Personnel

- Resumes/biographies of key personnel provided in this SOW are included solely for illustrative purposes and do not indicate the commitment of a specific named associate. Upon signing of a contract, we will identify those associates with the appropriate skills and background to deliver fully on the undertakings defined in the SOW.
- In the event that unforeseen circumstances require the replacement of an associate on an engagement, Gartner will inform Williamson County as soon as reasonably possible and substitute appropriate associates with comparable skills
- Gartner associates identified as Account Partners are not billed for as part of project pricing. Their guidance and support represents a significant value-add to the engagement.

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Proposal Assumptions – Place of Performance, Deliverables, & Changes to Scope

Place of Performance

- Except for meetings and workshops, all Gartner services will be performed at Gartner locations
- Meetings and workshops will be conducted via Webex or at Williamson County' offices, as mutually agreed
- Office space, telephones, printing/copying services and access to the open internet will be made available on a reasonable basis to Gartner at the Williamson County' locations for onsite time

Deliverables and Changes to Scope

- Any requests for additional information or resource (beyond the details described in the steps above) that are made by Williamson County will be considered a change in scope for this engagement and will be handled accordingly (see Changes to Scope section of this SOW)
- All deliverables will be developed using Microsoft products (e.g., Word and PowerPoint)

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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

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Investment Summary – Pricing Assumptions

Gartner Templates

- Pricing assumes that Williamson County will use Gartner's work product and deliverable templates without significant modification

Optional Services

- Gartner has identified recommended future phases of work to potentially occur after the proposed steps in this proposal. This proposal does not include pricing for these services.

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Changes to scope

The scope of this engagement is defined by this SOW. Any Williamson County' requests for changes to the SOW must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise Williamson County of the cost and schedule implications of the requested changes and any other necessary details to allow both parties to make an informed decision as to whether they will proceed with the requested changes. The parties shall agree in writing upon any requested changes prior to Gartner commencing work.

As used herein, "changes" are defined as work activities or work products not originally planned for or specifically defined by this SOW. By way of example and not limitation, changes may include the following:

- Any activities not specifically set forth in this SOW
- Providing or developing any deliverables not specifically set forth in this SOW
- Any change in the respective responsibilities of Gartner and Williamson County, including any reallocation or any changes in engagement or project manager staffing
- Any rework of completed activities or accepted deliverables
- Any investigative work to determine the cost or other impact of changes requested by Williamson County
- Any additional work caused by a change in the assumptions set forth in this SOW
- Any delays in deliverable caused by modification of acceptance criteria in this SOW
- Any changes to Research Analysts' time or resources

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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
- In accordance with Gartner's DIR Contract DIR-CPO-4927, Paragraph 10.12, liability for damages in any claim or cause of action arising out of this Agreement and the provision of the Services shall be limited to two times (2X) the fees paid by the Customer for the Service provided and billed under this Purchase Order.
- The Proposal, including the SOW, is valid for 60 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

06/20/2023

DATE

AGREED ON BEHALF OF Williamson County

Valerie Covey

SIGNATURE

Valerie Covey — Presiding Officer

PRINT NAME AND TITLE

Jul 10, 2023

DATE

PO NUMBER (If applicable)

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Gartner

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