



Ground Rules of ERM System Engagement

Endeavoring to evaluate business software systems is a challenging task at best. It can be very time consuming and possibly even confusing and frustrating. In the interest of making the process as efficient and effective as possible for all parties, we have found it to be in everybody's best interest to understand and agree to a few simple ground rules.

Truth and Honesty

This is no time for surprises or half truths. The stakes are high. Time and money are precious resources. We agree to disclose and represent the truth in our dealings with you. Particularly as it relates to software capabilities, appropriateness of specific software for a given set of requirements, and budget estimates. We expect you to do the same – to be forthright about your needs, impacts of solving a problem vs. not solving it, decision makers, timeframes, political liaisons, and criteria for making a buying decision.

Implementations are very difficult and so it is rare to be able to execute every one perfectly, but we always stick with it and get the job done. As a first sign of our commitment, we provide a complete and unfiltered client list to you for review.

Access

We will provide you access to our best methodologies and experiences in an effort to provide you the greatest return on investment. We have completed many 100's of Implementations and have become experts at it. We grant you access to our ownership when you want to look in their eyes and feel the commitment to provide a successful solution for you. In return, once we have proven to you that we bring value and expertise to the table as a trusted advisor, we expect to be granted the opportunity for a 15 minute meeting with your ownership or CEO.

Status

We agree not to play games with the phone by not taking/returning each other's calls or dodging tough conversations. We owe it to each other to be real about where we stand at all times. If we are not meeting your needs, then tell us immediately so that we can take steps to remedy it or choose to part company. And if we are meeting your needs and are in a



leading position, then tell us that also. Don't worry about losing negotiating position as we will give you the best offer possible the sooner you tell us we have won.

We agree at the conclusion of each evaluation meeting to verify the status of our relationship and to determine whether it makes sense to proceed with the next meeting. If so, great. If not, then let's say so and everybody is free to walk away. We will save everybody a lot of time and effort by being truthful.

Discovery

Gaining a clear understanding of your needs, opportunities and challenges is an absolutely essential step in making a comprehensive recommendation that includes all the critical components. Features and functions do not run companies however; people do. So we will need approximately 45 minutes with each of your key personnel to ensure that we have a clear understanding of their needs. We all need to agree to make a significant effort with regard to thorough needs analysis, and acknowledge that professional services should be engaged early in the process to do so.

Evaluation Plan

We will mutually agree to a written document that defines our intended process and key steps for conducting the software evaluation. We will provide a suggested template as a starting point for your consideration. The purpose of which is to define as best as possible the typical time frame and journey that is undertaken when conducting a comprehensive evaluation of software. This will ensure no surprises and that all parties know what the next step in the process is should we agree to take that step.

Signature, _____ **Date** _____