

TOP 5 PRE-RFP ACTIONS FOR ERP SUCCESS

STRATEGIC PREPARATION GUIDE FOR STATE & LOCAL AGENCIES



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I LEARNED THE HARD WAY SO YOU DON'T HAVE TO



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After implementing Workday for 14,000 employees at Maricopa County, I can tell you exactly what I wish someone had told me before I started.

The problem? I had no one to call. No advisor who'd been on the government side. No one who understood what it was like to sit in the Director's chair, facing a multi-million-dollar transformation with my career on the line.

I made mistakes:

- Spent days on software, 1 hour on implementers
- Asked for "everything we have + everything possible"
- Received 18 proposals (200 pages each = 3,600 pages!)

Now I guide state and local agencies through this exact decision—bringing that hard-won perspective from being in your seat, not on the other side of the table selling software.

I see agencies making the same mistakes I made. The ones that cost us 6 weeks, budget stress, and late nights wondering if we'd get it right.

These 5 actions are what I wish I'd done 12 months before our RFP dropped. Not consulting theory—battlefield lessons I'm sharing so you don't have to learn them the way I did.

WHY PRE-RFP PREPARATION DETERMINES SUCCESS

30–40%

FASTER IMPLEMENTATIONS

Agencies that invest in strategic pre-RFP preparation achieve 30–40% faster implementations than those rushing to procurement.

78%

OVER BUDGET & SCHEDULE

Without pre-RFP planning, 78% of government ERP projects exceed their budget and timeline — often by 6–12 months.

**12–24
MONTHS**

THE PREPARATION WINDOW

The 12–24 month window before RFP determines success and whether your RFP drives transformation or chaos.

01

ASSEMBLE YOUR STRATEGIC EXECUTIVE COALITION

The Mistake Most Agencies Make:

They assign one executive sponsor (usually whoever raised their hand first or got voluntold) and expect that person to champion transformation across the entire organization.

The Reality:

Government ERP touches everyone. HR systems impact every department. Finance systems touch every budget. You need champions across your organization who have influence, credibility, and political capital in their domains.

What To Do:

Build your executive coalition strategically. Include:

- Core functions: IT, HR, Finance leadership
- High-impact departments: Large organizations with voice and influence
- Elected offices: County Clerk, Treasurer, Sheriff (anyone with independent authority)
- Union leadership: If applicable, bring them in early

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02

BUILD YOUR INTERNAL BUSINESS CASE

The Mistake Most Agencies Make:

Trying to move a project forward before building support. You need funding, board approval, executive alignment—but you're asking people to say "yes" without giving them the ammunition to defend that decision.

The Reality:

Most organizations wait until their systems fall apart or a vendor announces end-of-life support. Then it's crisis mode—rushed decisions, no time to build consensus, and leadership skeptical about spending millions on "another IT project." But you don't need a crisis to build a compelling case. You need to articulate what the new system achieves and why it's worth the investment—before someone forces you to defend it under pressure.

What To Do:

Build your business case 12 months before your RFP when you have time to gather data and build support across leadership.

At Maricopa County, I created a one-page executive briefing (printed on heavyweight "nice paper"—presentation quality matters). I took it to the County Manager, CFO, and CIO for one-on-ones. Then used it in board briefings so everyone understood the "why" before we asked for \$18M.

Your one-pager should answer:

- Current state pain (what's broken that impacts operations?)
- Annual system facts (scale: users, transactions, dollars processed)
- Strategic rationale (why now vs. waiting another year?)
- Future state vision (what capabilities we'll gain)
- Project cost breakdown (total investment, timeline)
- Risk mitigation (how we'll avoid the failures leadership has read about)



03

SEPARATE SOFTWARE FROM IMPLEMENTATION PARTNER SELECTION

The Mistake Most Agencies Make:

Spending days evaluating software features (demo after demo, feature comparison spreadsheets) and one hour evaluating the implementation team. I made this mistake at Maricopa. Don't.

The Reality: The software works. Deloitte research shows 85% of ERP platforms have marginal functional differences. Oracle works. SAP works. Workday works.

What fails? Implementation. Marin County's \$30M SAP disaster? SAP worked fine. Deloitte consultants "lacked basic SAP understanding" per the county's own assessment. 60% of government agencies would choose a different implementation partner if they could do it over.

What To Do:

Structure your evaluation to match what determines success.

Weight your scoring:

- Implementation methodology and team quality: 30%
- Government domain expertise: 25%
- Change management capability: 20%
- Vendor stability: 15%
- Cost: only 10%

Interview the actual consultants who'll be assigned (not firm reps).

Require government accounting knowledge (GASB, CAFR, fund accounting) and public sector compliance experience.

04



DESIGN YOUR RFP EVALUATION PROCESS (BEFORE PROPOSALS ARRIVE)

The Mistake Most Agencies Make:

Receiving 200-page proposals from multiple vendors with 30 days to evaluate while running their actual job. Without pre-defined criteria, they're guessing or defaulting to whoever has the best proposal writers.

The Reality:

I received 18 proposals at Maricopa County. Each 200+ pages. That's 3,600 pages in 30 days while managing HR for 14,000 employees. Without an evaluation framework, I would have drowned. Or worse, picked based on who wrote the prettiest PowerPoint. Without pre-defined weighted criteria, agencies waste 3-4 months building consensus and often select solutions that check the most boxes—not the right ones.

What To Do:

Develop your weighted evaluation matrix 6-9 months before your RFP. Define your scoring rubric: 0 (not met), 1 (partially met), 2 (fully met), 3 (exceeded). Publish criteria and weights in your RFP so vendors focus proposals on what actually matters.

Plan your evaluation timeline:

- Proposal review period
- Scoring sessions
- Demos/Orals
- Consensus building (3-4 weeks, not 3-4 months)
- Finalist orals

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05

PLAN YOUR CHANGE MANAGEMENT STRATEGY

The Mistake Most Agencies Make:

They treat change management as training that vendors provide during implementation. A few town halls, some emails, and a training schedule created 90 days before go-live. That's communication, not change management.

The Reality:

Organizations with effective change management show 30% lower failure rates and 134% ROI. Yet 70% of failures stem from inadequate change management because agencies start too late and confuse emails with engagement.

What To Do:

Start 6-12 months BEFORE your RFP. This isn't implementation work. This is organizational preparation.

- Assign executive ownership (not PM responsibility)
- Identify change champions at all levels
- Develop multi-channel communication strategy (marketing, branding, influencers)
- Address "what's in it for me" for every role
- Create stakeholder engagement before procurement begins

Think of it like an internal marketing campaign. You're selling transformation before the vendor arrives.

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READY TO ASSESS YOUR PREPARATION?

The difference between success and the Air Force's \$1.1B failure wasn't software.

It was preparation.

These 5 actions are what successful agencies do in the 6-12 months before their RFP drops.

ASSESS YOUR READINESS

Built on lessons from 20+ public-sector ERP projects

**TAKE THE ERP READINESS
ASSESSMENT**

HOW IT WORKS:

Step 1: Click the button above

Step 2: Complete the short form ($\approx$ 4 minutes)

Step 3: Receive your custom readiness report, combining expert logic, proven ERP data, and research-driven analytics.

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