

# Beverage Distributor – ERP Case Study

## Key Takeaways:

- A Beverage Distributor using a modern ERP accounting software package engaged RubinBrown to assist in the evaluation of a new software package that would perform with equal or better functionality and more attractive contract terms.
- RubinBrown developed business requirements definitions with the client, led vendor management with the short-listed options, and handled contract negotiations with the selected vendor.
- The client was a repeat customer, having used the RubinBrown team in 2016 to perform a full ERP evaluation and help select the previous ERP accounting software.

## Client:

An \$875 million, 1,700-employee Beverage Distributor in the Southwest engaged RubinBrown to assist with an ERP evaluation and the selection of a new accounting system.

## Challenge:

With RubinBrown's assistance in selecting the right system in 2016, the Distributor became one of the most successful sales, operations, and marketing organizations in the wholesale beverage distribution industry. Upon the conclusion of the original agreement period for the ERP accounting system chosen in 2016, the software provider decided to significantly alter the conditions for the subsequent contract in 2023.

Even though the software chosen in 2016 met the Beverage Distributor's needs, the drastic changes in terms were unacceptable. In 2023, the client reconnected with RubinBrown to find a new ERP accounting software vendor for a more affordable long-term solution.

## Actions:

- Reviewed business requirements, business processes, and defined system functionality
- Identified the critical requirements of the accounting software solution for evaluation
- Developed a Request for Information (RFI) based on the Distributor's business requirements
- Identified a list of qualified candidates among the market's financial solution providers
- Facilitated software demonstrations with the short-listed candidates

### Solution:

- The client selected their preferred vendor based on RubinBrown's RFI responses, vendor evaluations, and software demonstrations.
- RubinBrown executed vendor workshops to create a Statement of Work for implementation.
- RubinBrown provided input regarding software contracts and agreements.

### Results:

After our collaboration, the client expressed satisfaction with the agreement made with their new software vendor. They appreciated the RubinBrown team's support and guidance throughout the process, feeling confident in every step.

A few months later, the transition to the new software provider went smoothly and was completed successfully. The client was pleased with the outcome and felt that the partnership with RubinBrown played a crucial role in making the entire process efficient and stress-free.