ERP Selection Case Study: Environmental Consulting Firm

Key Takeaways:

- RubinBrown was engaged to optimize operations and guide the selection of a modern Enterprise Resource Planning (ERP) system tailored to the client's core business needs. The engagement focused on:
- Selecting a best-fit ERP to streamline critical business processes.
- Identifying opportunities for process standardization and operational efficiency.

Critical Success Factors for ERP Selection:

- Enhanced Customer Relationship Management (CRM) capabilities.
- Robust embedded controls for data management.
- Advanced document and project management functionalities.
- Comprehensive project accounting and seamless time entry/payroll integration within a unified platform.

Client:

This California-based environmental consulting firm is a state leader with over 400 professionals across 12 offices; the firm provides multidisciplinary services in environmental sciences, planning, and engineering. Serving both public and private sectors, it delivers tailored solutions to address complex environmental challenges while ensuring regulatory compliance and project success.

Core Expertise:

- Environmental Planning
- Biological and Cultural Resources Assessment
- Regulatory Compliance
- Water Resources Management
- Environmental Site Assessment and Remediation
- Sustainability Services

The firm's dedicated GIS and graphics team enhances data visualization, enabling clear communication of complex environmental data. Renowned for technical excellence, client-centric service, and deep expertise in California's environmental regulations, the firm drives sustainable development and environmental stewardship across industries and government agencies.

Challenge:

The client sought to modernize its digital infrastructure to support future growth and evolving business demands. Its legacy system, Ajera-Deltek, was nearing end-of-life and no longer aligned with strategic objectives. The organization required a comprehensive operational assessment to prepare for a seamless ERP transition.

Primary Objectives:

- ERP Selection and Implementation: Replace Ajera-Deltek with a scalable, modern ERP solution.
- Process Standardization: Establish consistent, efficient processes across departments.
- Eliminate Workarounds: Reduce reliance on inefficient tools like Excel and custom Smartsheet applications.
- Enhanced Data Visibility: Provide real-time data access and advanced reporting for informed decision-making.
- Financial Optimization: Strengthen financial structures while maintaining accurate general ledger integration.

Actions Taken:

1. **Operational Assessment**: Conducted a thorough review of existing processes, workflows, and technologies to establish a baseline, identify inefficiencies, and define improvement opportunities.
2. **Vendor Selection Process**: Developed a detailed vendor information packet with clear requirements and evaluation criteria. Managed market research, vendor outreach, product demonstrations, and contract negotiations to ensure alignment with business needs and long-term value.
3. **Data Strategy Development**: Facilitated cross-functional data discovery workshops to assess practices, identify inconsistencies, and address challenges. Designed a master data cleansing approach, established a scalable governance framework, and provided actionable recommendations to enhance data quality and system integration.

Solution:

RubinBrown provided end-to-end project leadership, guiding the client through the evaluation and selection of a new ERP system. Through a collaborative and structured process, the client selected **Microsoft Dynamics 365 Finance & Supply Chain with AEC360**, which offered superior productivity and collaboration capabilities. The evaluation and selection were completed on time and within budget, reflecting exceptional project management.

Results:

- Process Mapping: Delivered 3 comprehensive end-to-end process maps and 5 detailed process deep dives, capturing critical workflows across functions.
- Pain Points and Opportunities: Identified 121 pain points, 6 early-start readiness initiatives, and 10 critical success factors to ensure effective change management.
- ERP Selection: Evaluated 3 ERP vendors, selecting Microsoft Dynamics 365 with AEC360 as the optimal solution, with favorable pricing and terms secured through negotiation.
- Data Management: Cataloged 436 distinct data entities across structured, semi-structured, and unstructured formats, laying the groundwork for a robust data migration strategy.
- Data Governance: Developed an early-start data cleansing plan, governance framework, and PMO guidelines to ensure ERP readiness and sustained data quality.
- Strategic Roadmap: Recommended a forward-looking data transformation roadmap aligned with the client's long-term business goals and vision.

This initiative positioned the client for operational excellence, enhanced decision-making, and sustainable growth in a competitive market.