

August 15, 2023

# ERP Journey: ERP Evaluation & Selection



MEET

# Our Presenters



**Lindy Antonelli**

Partner, Industry Experience: 30  
years

Armanino Advisory LLC



**Talbot Harty**

CIO Advisory Executive  
Industry Experience:  
34 years



**Brandt Kucharski**

CAO, Ethos  
Former CAO, Grubhub  
Industry Experience: 20 years

KNOWLEDGE

# Learning Objectives



**Answer common concerns when selecting an ERP system**



**Determine how to align ERP requirements with your business goals**



**Review tips and tricks for conducting ERP research, comparing options and involving stakeholders**

# Who is Armanino?

WHERE WE ARE

# Our Locations

2500+ Employees | 18<sup>th</sup> Largest CPA & Consulting Firm

**CALIFORNIA**

- San Ramon
- San Jose
- San Francisco
- Los Angeles (2)
- Irvine
- El Segundo
- Woodland Hills
- San Luis Obispo
- Torrance

**WASHINGTON**

- Bellevue

**COLORADO**

- Denver

**IDAHO**

- Boise

**TENNESSEE**

- Nashville

**TEXAS**

- Austin (2)
- Dallas

**ILLINOIS**

- Chicago
- Naperville

**MISSOURI**

- St. Louis
- St. Charles

**PENNSYLVANIA**

- Philadelphia
- Scranton

**NEW YORK**

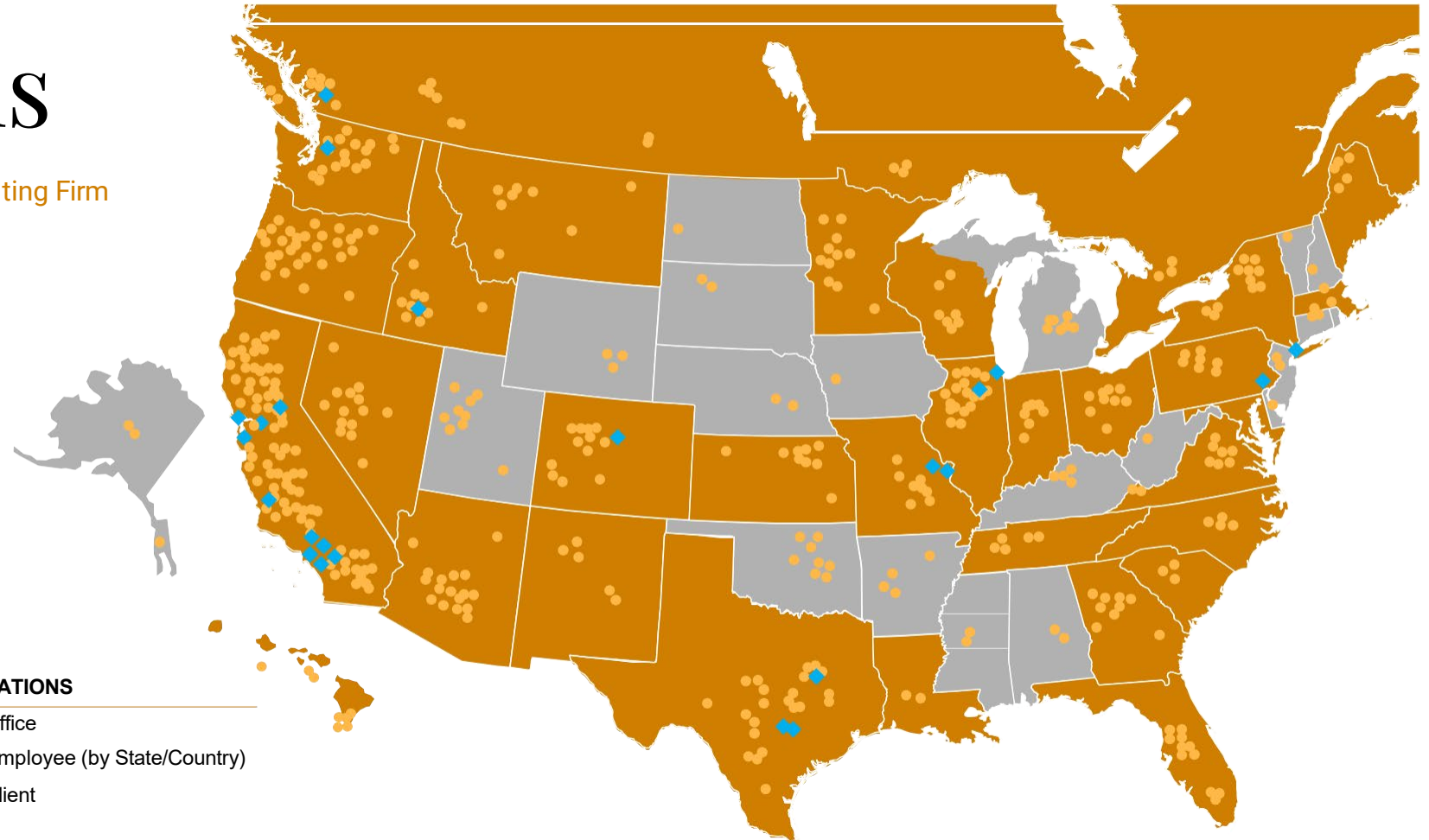
- New York City

**CANADA**

- Vancouver

**LOCATIONS**

- ◆ Office
- Employee (by State/Country)
- Client



ARMANINO

# Firm Overview

*Count on Armanino to think strategically and provide sound insights that lead to positive action. We address not only your compliance issues, but your underlying business challenges.*

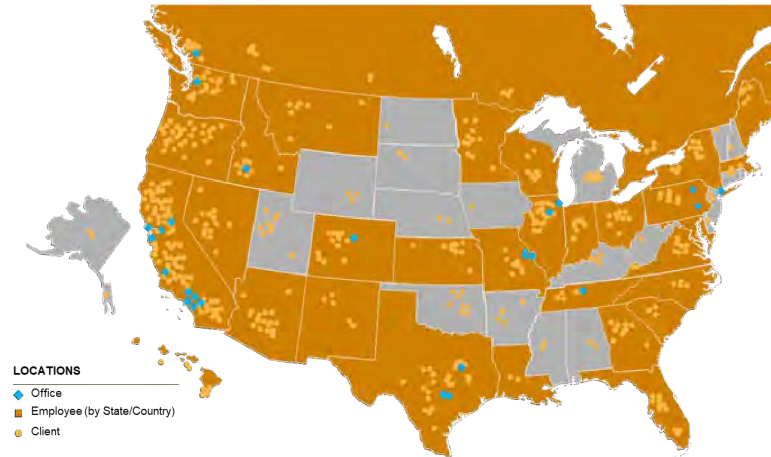
## Purpose

To be the **most innovative** and **entrepreneurial firm** that makes a **positive impact** on the lives of **our clients, people and our communities.**

## Snapshot

2500+ Employees  
 Team Members in 23 States  
 18th Largest CPA & Consulting  
 Largest Niche: Technology

## Locations



### CALIFORNIA

- San Ramon
- San Jose
- San Francisco
- Los Angeles (2)
- Irvine
- El Segundo
- Woodland Hills
- San Luis Obispo
- Torrance

### TEXAS

- Austin (2)
- Dallas

### ILLINOIS

- Chicago
- Naperville

### MISSOURI

- St. Louis
- St. Charles

### PENNSYLVANIA

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## AFFILIATE COMPANY

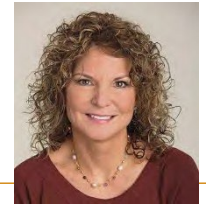


## RECOGNITION & AWARDS





# ERP Selection Criteria



# Selection Criteria



Key decision factors that your peers – **financial business decision makers, key users and company owners** – use to evaluate a new system to:

1. Reduce risk
2. Realize value
3. Reap success!

Cloud Accounting Institute Survey Study

Modules and features you need to run your business

Let dept. leaders pick best solutions for industry / needs

Lowest TCO  
Rapid ROI

Pick your Partners!





# Industry Considerations



Technology



Life Sciences



Const. & Real Estate



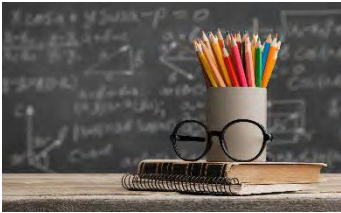
Financial Services



Cannabis



Nonprofit



Education



Healthcare



Law Firms



Consumer Business



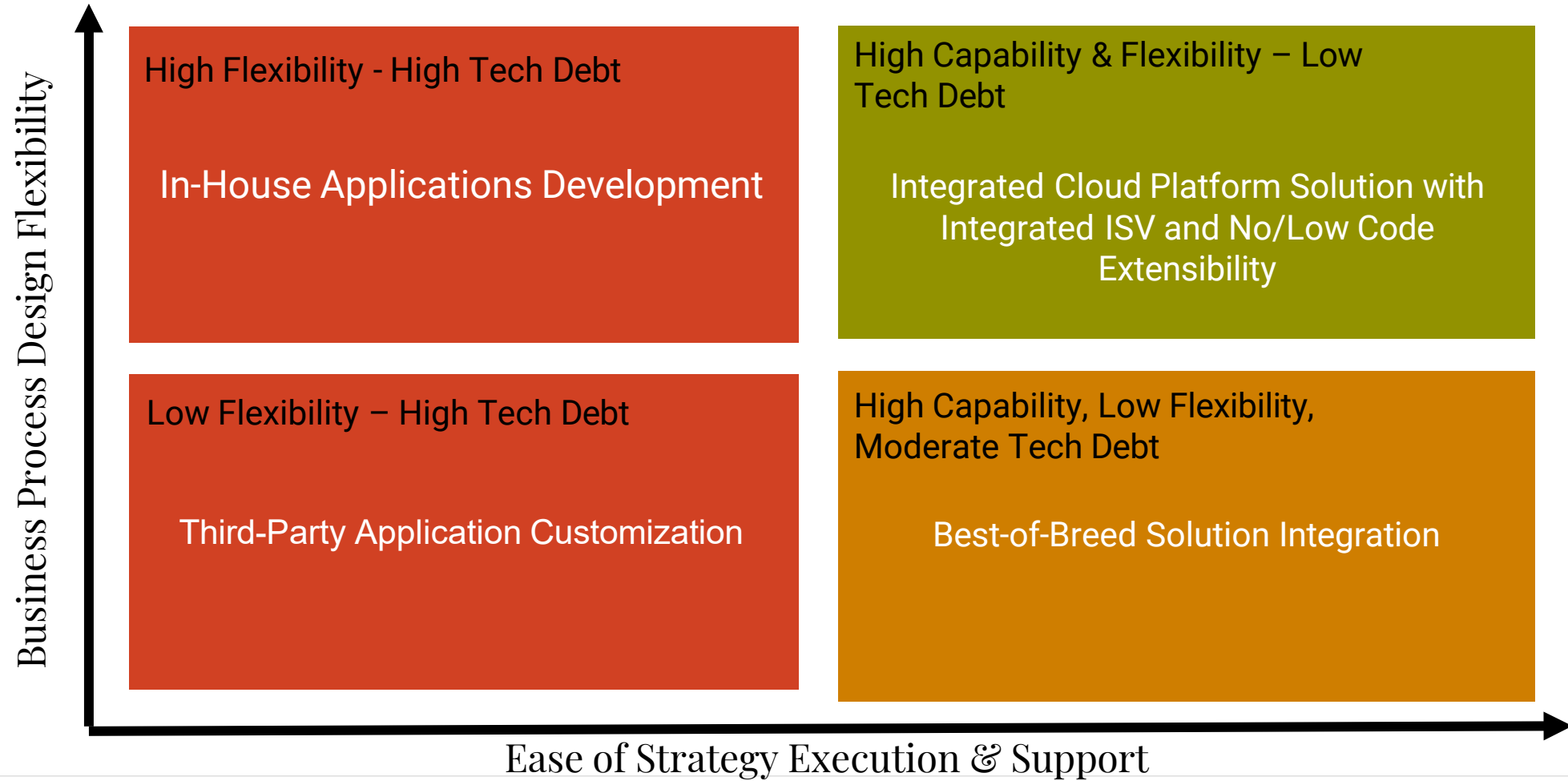
Manufacturing/Distribution



Entertainment



# ERP Applications Strategy Matrix



# ERP Journey: ERP Implementation and Integrations

September 6, 2023 | 04:00 PM - 04:30 PM EDT

REGISTER TODAY



Don't miss the 2<sup>nd</sup> webinar in our ERP Journey Series



Discuss critical steps and strategies for successful ERP implementation



Explain the importance of proper planning, including project management and resource allocation



Highlight the significance of change management and employee training during the implementation process



# Armanino Led Virtual Classes

Whether you have new employees that need to get up to speed quickly, or simply need to learn more about the features and functionality an ERP system, check out our [Armanino Academy!](#)





# Possible *(Re)Defined*™

Additional questions?  
Reach out to us at [Experts@armanino.com](mailto:Experts@armanino.com)

# Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.