

Private Equity

ERP Advisors Group (EAG) is one of the top independent enterprise software advisory firms for Private Equity.

We help private equity firms with a variety of software advisory services. We perform pre-purchase analysis of the acquisition's ERP system for feedback and costs needed to update the systems, as well as help with negotiations. Additionally, when PE firms make new acquisitions, the acquired company may need new systems. We work collaboratively with the operating company to find the best solution for their strategy. This could include evaluating a stand-alone system or assisting with a roll-up strategy into the holding company's existing systems. We can also help negotiate software deals with vendors that cater directly to Private Equity firms, thus saving our clients significant recurring fees.

Practical Deliverables



ERP Advisors Group acts as an extension of private equity owners while enlisting consensus with their operators to define requirements, setting their software strategy for one or multiple companies, providing a roadmap that accounts for future acquisitions or dispositions, conducting a diligent vendor selection process, and managing the entire implementation.

- **Develop the ERP Strategy for Your Portfolio** We will define your operating company's needs and wants as well as how you would ideally use new automated solutions across your portfolio of companies. Venture capital firms may seek to leverage one new ERP platform across similar portfolio companies with a consolidated roll-up into one parent, or may simply want to direct the operators of individual portfolio companies to make a wise decision for that single operation.
- **Select New Software for Your Portfolio** We will guide you through selecting the best fit, most cost-effective business applications and implementation partners to best automate and streamline accounting systems, provide detailed analytics and reporting, manage and organize client data, etc.
- **Implementation Project Management** After finalizing your ERP software and services contracts, EAG stays with you to oversee your portfolio's implementation until they successfully go live. We will oversee integrations, data migration, change management, budgets, design and configuration, walkthroughs, training, testing, and go-live cutover and will provide executive and project sponsor support throughout the duration of your project.
- **Data Migration** We assist with all components of data migration: extraction, cleansing, transformation, and loading into your new system to ensure you have complete confidence in the accuracy of your data at go live.

Why Private Equity Firms Seek ERP Upgrades for Their Portfolio Companies

Surveys across all of our private equity clients reveal the most common reasons why they need new ERP to automate their business:

- Transactions processed in multiple legacy ERP systems lead to duplication of effort in each geography.
- Time-consuming to create consolidated financial statements across multiple ERPs.
- Manual effort is required to create intercompany consolidations and is prone to errors often causing revenue leakage.
- Unable to prepare reports by business unit, line of business, or geography, causing significant manual work to gather and report on performance data.
- Unable to report on KPIs and other management requests without significant manual research and work.
- Revenue on projects is manually calculated outside of the system and margin analysis is not visible to management.
- Inaccurate reporting on state of project progress due to a lack of functionality in tracking and transitioning projects between life cycle stages.
- Budgets for projects are Excel-based and must be imported into the system creating errors and low visibility for management.
- No integration between the sales system and the main ERP leads to multiple versions of the truth.
- Inconsistent information across the organization requires manual research and correction, significantly delaying report response time.



390 Union Boulevard, Suite 540
Lakewood, CO 80228

erpadvisorsgroup.com
866.499.8550

Shawn was great to work with. He has so much experience and his approach was very practical. And the fact that it's truly an independent advisor, not tied to any specific solution or vendor or anything like that gave me a lot of comfort. We made the decision to utilize ERP Advisors Group because we knew this was such a big change for the organization that we wanted all the additional help we could get. Having someone come in to support what we needed as a company was really helpful.

Adam Birk, COO

VERTIKAL BRANDS, A CLEARVIEW CAPITAL HOLDING COMPANY



ERP for Private Equity Companies

ERP Advisors Group will help you not only define your requirements but more importantly, we will bake in the best practices for your company into your Request for Information and Demonstration Script.

We conduct dozens of selections every year, equating to tens of millions of dollars in software and services sales. With our deep knowledge of ERP, we will help you find the right ERP for your company, AND the right professional services company to implement it.

We regularly vet the top, most viable ERP systems for privately held companies.