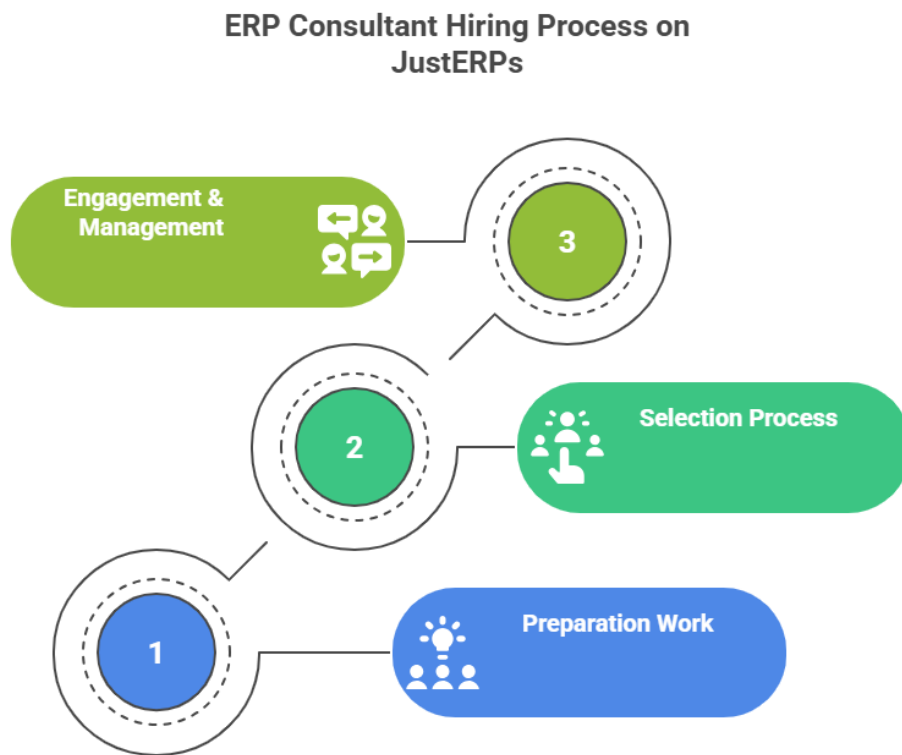


How to Hire ERP Consultant

JustERPs Hiring Guide: How to Select the Best ERP Consultant



Made with Napkin

Phase 1: Preparation Work Before Hiring

The Golden Rule: Define Your Scope of Work (SOW)

Hiring an ERP consultant is a significant decision. This process ensures you find a qualified professional who can deliver real value to your business. The most critical step is defining a detailed **Scope of Work (SOW)**. This document aligns your expectations with the consultant's deliverables and is the foundation for a transparent agreement.

When you contact a consultant, their first question will likely be, "**Do you have a Scope of Work document you can share?**" Being prepared with this answer will significantly speed up the hiring process and attract serious, high-quality experts.

Your Scope of Work Should Include:

Step 1: Define Your Project Scope with Crystal Clarity

You cannot hire effectively if you don't know what you need. Be specific.

- What is the core problem? (e.g., "We need to migrate from SAP ECC to S/4HANA," "We need to set up Oracle NetSuite from scratch," "Our Odoo manufacturing module isn't working correctly.")
- What are your specific goals? (e.g., "Automate our financial reporting," "Reduce inventory carrying costs by 15%," "Integrate our e-commerce store with the ERP.")

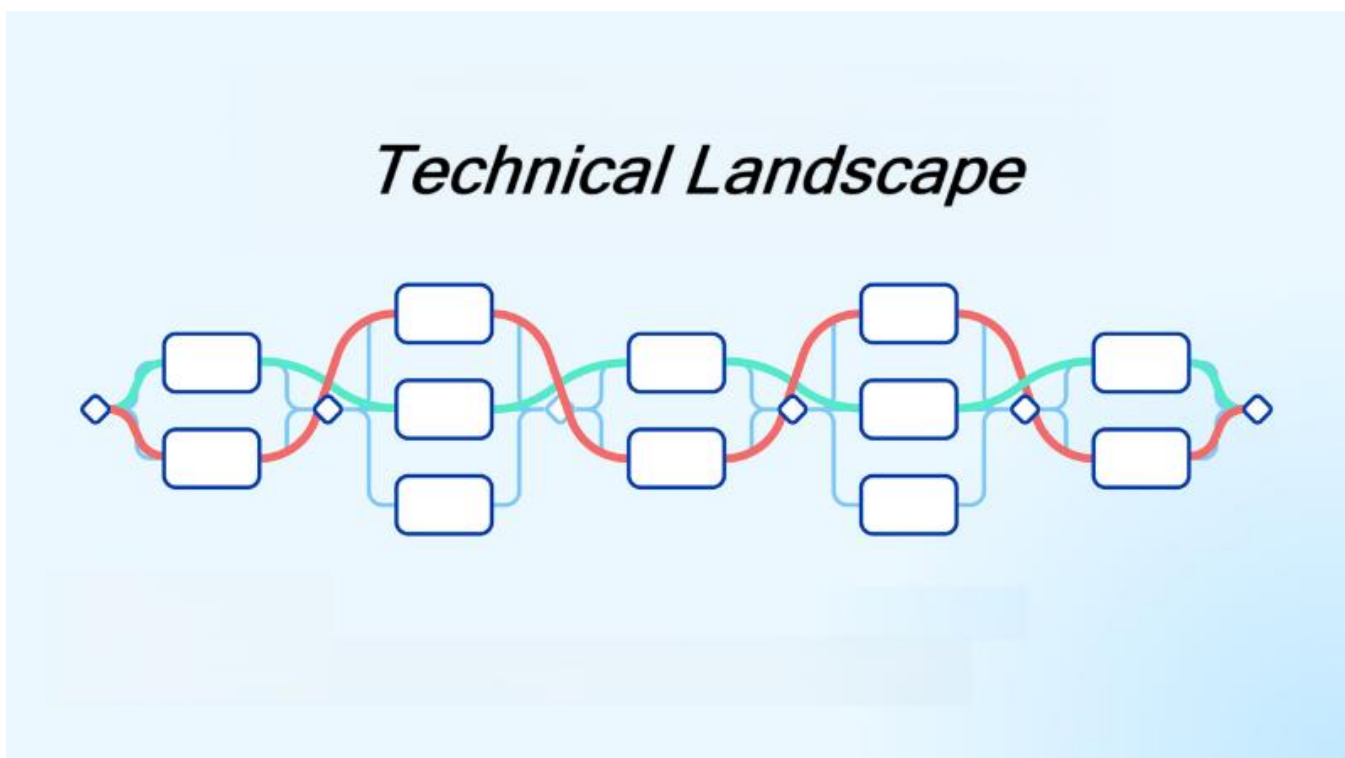


Step 2: Define your Technical Landscape

- **ERP System & Version:** (e.g., Microsoft Dynamics 365 BC 2023 Wave 2, Odoo v16, SAP ECC 6.0)
- **Modules Involved:** (e.g., Finance, Manufacturing, Supply Chain)
- **Current Patch/Service Pack Level:** Mention any recent upgrades.
- **Third-Party Software & Integrations:** List all connected systems (e.g., Shopify, Salesforce, custom-built CRM, Power BI).
- **Access requirements:** Are you willing to grant remote access to your systems?

Step 3: Project Logistics

- **Desired Timeline:** What is your timeline? Is this an urgent fix or a long-term project? Include key milestones and your final deadline.
- **Budget Range:** What is your budget range? ERP consultants vary from \$25/hour to \$200+/hour. Have a realistic budget in mind.
- **Access Requirements:** Confirm if you can grant the consultant secure remote access to your systems for implementation or analysis.



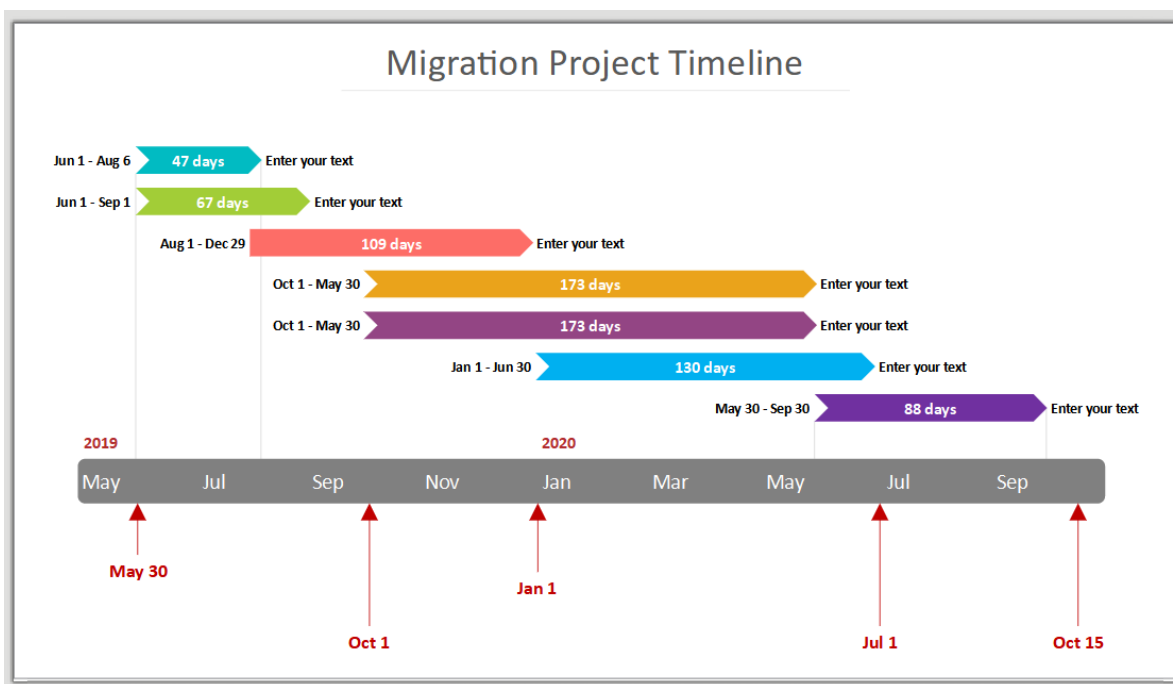
Step 4: Supplement with Supporting Information

For the consultant to fully grasp your environment, be prepared to provide additional context:

- **Your Business Profile:** Briefly describe your company's size, industry, and what you produce or do.
- **Current Process Documentation:** Any flowcharts, screenshots of errors, or reports that illustrate the problem.
- **Target Audience/Users:** Who will be using the new system or process?

Why This Process Works for You:

- **Clarity:** A detailed SOW eliminates ambiguity and prevents scope creep.
- **Accuracy:** Consultants can provide precise proposals and timelines, not rough guesses.
- **Quality Proposals:** You will receive serious, well-defined bids from consultants who are confident they can deliver on your specific requirements.
- **Transparency:** The SOW acts as a foundational agreement, ensuring everyone is aligned on what will be delivered, protecting both you and the consultant.



Phase 2: The Selection Process

Step 2.1: Search and Shortlist Proactively

After your scope of work document, supportive document, you should start searching actively for the talent.

- **Use Platform Filters:** Use search terms like "SAP Consultant," "NetSuite Specialist," "Odoo Developer." Filter by job success rate, earnings, and client reviews.
- **Analyze Profiles Meticulously:**
 - **Portfolio & Case Studies:** Do they show results? Look for phrases like "reduced process time by X%" or "saved \$Y in operational costs."

- **Reviews & Ratings:** Read both positive and negative reviews carefully.
- **Skills Tests:** Many platforms have skill verification tests. A top score in "ERP Implementation" is a great sign.
- **Create a Shortlist:** Save the profiles of 3-5 consultants who seem like the best fit.

Step 2.2: Initiate Contact and Interview

- **Invite to Job:** Use the platform's "Invite to Job" feature for your shortlisted candidates.
- Conduct a Brief Interview via Platform Messaging or Video Call:
 - Ask them to briefly explain their approach to your problem.
 - Ask about their experience with your *specific* ERP version and industry.
 - Discuss communication style and availability (especially important across time zones).
 - **Key Question:** "Can you provide an example of a similar project you completed and the outcome?"

Step 2.3: Evaluate Proposals and Choose

- **Look Beyond Price:** The cheapest option is often the most expensive in the long run. Value expertise over cost.
- **Clarity of Proposal:** Did they understand your needs? Do they have a clear plan and milestones?
- **Check for Questions:** The best consultants will ask insightful questions about your project in their proposal.

Phase 3: Engagement & Management (After Hiring)

Step 3.1: Start with a Paid Pilot or Milestone

Never release the full project budget upfront.

- Use the platform's **milestone payment system**. Break the project into phases (e.g., Discovery, Solution Design, Implementation, Testing).

- For a large project, start with a smaller, paid discovery or assessment milestone. This lets you evaluate their work with minimal risk before committing to the full project.

Step 3.2: Establish Clear Communication Protocols

- **Tools:** Decide on communication channels (platform messaging for official record-keeping, with video calls for complex discussions).
- **Frequency:** Schedule regular check-in calls (e.g., twice a week for 15 minutes).
- **Point of Contact:** Designate one person from your team as the main contact to avoid confusion.

Step 3.3: Collaborate and Provide Feedback

- Provide the consultant with the access and information they need promptly.
- Give constructive feedback at each milestone. This ensures the project stays on track and aligned with your expectations.

Step 3.4: Review, Approve, and Pay Milestones

- Upon completion of a milestone, thoroughly test and review the delivery.
- Once you are satisfied, release the milestone payment on the platform. This protects both you and the consultant.

Step 3.5: Close the Project and Leave a Review

- Once the final deliverable is accepted and the last payment is released, formally close the contract on the platform.
- **Leave a detailed, honest review.** This helps other businesses and rewards the consultant for good work.

YOUR FEEDBACK



Key Considerations & Red Flags

- **Beware of "Yes" Men:** A good consultant will tell you what you *need* to hear, not what you *want* to hear. They should identify potential risks and challenges.
- **Data Security:** Use the platform for all communications and payments. Never move transactions offline; you lose all platform protection.
- **Realistic Expectations:** Freelance platforms are excellent for specific projects, fixes, and short-term guidance. For a full-scale, multi-year ERP implementation, you may still need a dedicated consulting firm, though a freelance expert can be a crucial part of that team.

By following this structured process, you significantly increase your chances of a successful and productive engagement with an ERP consultant.

[Hire ERP Consultant—Click Here](#)