



Choosing A NAV Partner Checklist

Description	✓
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Qualifications

Certifications for each of the core NAV functional areas you will Implement.	
Experience with your industry or type of business.	
Experience with key processes/technologies.	
General track record of success.	
Specific track record of success in your industry and/or with the key processes/technologies you will be using.	

Initial Discussions

Spends sufficient time to learn about your business and what you do.	
Presents adequate information about the partner for you to answer the points listed in the “Qualifications” section of this checklist and satisfy any other questions you might have.	
Does sufficient research to fully understand the project you are contemplating, and proves this by either presenting a verbal summary or delivering a written summary back to you.	
Insists on having the attention and commitment of your key participants.	
Good synergy between the two teams.	
Is a good listener	



The Quotation Process

<p>Delivers a complete quote that:</p> <ul style="list-style-type: none"> • Clearly defines your needs • Identifies gaps in functionality and/or business processes • Identifies risks and mitigation strategies • Defines how the system will be used • Defines what changes are needed to the system • Provides a complete training plan • Provides a realistic project plan • Includes data conversion • Includes a detailed budget • Has a communication plan • Identifies all of the key participants in the project • Identifies the need for extensive testing 	
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Implementation Skills

Ability to present Sure Step in detail and answer all related questions.	
Can reference past implementations involving existing staff.	
Were past implementation on time and on budget?	
Were there any glaring errors or omissions in the new systems at go-live?	
Were there any problems at cut-over to the new systems?	
Was there any unscheduled downtime?	
Did anything have to be rolled back and repeated?	

Training

Has a sufficient number of NAV Microsoft Certified Trainers (MCT) with consulting experience for the project.	
Offers both on-site and remote training options, in addition to the ability to advise/coordinate Microsoft training online and/or in the classroom.	
Can walk you through a proper training plan.	



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Can verify with past clients that adequate training was provided, especially by the time their system went live.	
Offers training based on how you will use the system and not just generic functionality.	
Will train using your data where possible.	

Support

Offers on-going support as demonstrated by customer retention and satisfaction	
Provides emergency contact options for after-hours.	
Has a proven track record of seeing problems through to their satisfactory resolution.	
Has a proven track record of customers satisfied with the support they've provided.	