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**Green Mountain Higher Education Consortium**

**ERP Demonstration Planning Guidelines**

**Demonstration Notes**

Each vendor will be permitted 2 days of presentation time. If less time is necessary, please alert Natalya Boock at nboock@campusworksinc.com

Day 1: 8:30 a.m. to 6:00 p.m.

Day 2: 8:30 a.m. to 3:00 p.m.

* For Vendors who also present Advancement, those presentations will be on Day 2 to allow Advancement professionals to attend Day 1 overviews.

Demonstrations will require live streaming. Vendors need to have the ability to livestream two concurrent sessions with about 100 users being able to see and hear the presentation and be able to call in questions. Remote participation in Office Hours is also requested. Please provide links to the live videoconferences 2 business days before arrival.

**Agenda Guide**

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| **Time or Planned Duration** | **Topic** | **Audience** | **Notes** |
| **Required Activities** | | | |
| 75 minutes | Corporate & Solution Overview | Executives & College Community | * Day 1, first session * Include big picture functional roadmap * No other sessions should be scheduled at this time |
| 75 minutes | Implementation Approach | Executives & College Community | * Vendors have the opportunity to host lunch for this session. * No other sessions should be scheduled at this time |
| 75 minutes | Technology Briefing | IT staff | * Architecture & technical roadmap * Concurrent with other session |
| 60 minutes | Reporting Briefing | Open to all | * This is a critical session, as the community needs to be comfortable with a decentralized reporting approach * Can be concurrent with faculty or student session |
| 60 minutes | Faculty Overview | Faculty | * Tailored presentation for faculty * Concurrent with other session (e.g., reporting or student session) * Could be 4:15 or 4:30 as there will be no classes at that time |
| 45 minutes | Student Access | Students | * Tailored demonstration for students * Concurrent with other session (e.g., faculty or reporting session) * Could be after faculty session – no classes at that time |
| 120 minutes total over 2 days | Office Hours | Open to all | * Scheduled by the vendor throughout the agenda * Provides time for 1:1 review & discussion with interested college personnel to drill down on specific items. Typically scheduled by subject area, as vendor staff are available. * Concurrent with other sessions |
| 60 minutes | Q&A w/ GMHEC Steering Committee | GMHEC Steering Committee | * Scheduled as last session on last day: Likely @ 2:00 p.m. Day 2 * Can be concurrent with other session |
| Determined by Vendor | Feature/function sessions by topic area | Users in each of the functional areas | * Ability to run 2 concurrent sessions in order to cover as much material as possible * Include specific to function roadmaps * Do not schedule the bursar/student accounts session in conflict with the registrar’s session or in conflict with financial aid * Do not schedule the payroll session in conflict with the HR benefits session * Please schedule financial management demonstrations on Day 1 to allow finance professionals to participate in Advancement demonstrations on Day 2 * For Advancement: do not schedule the gift recording session in conflict with the Finance endowment module * Provide detailed schedule as soon as possible so Colleges can schedule individual groups |