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+44 345 094 0945
www.waterstons.com

Case study

Sector Distribution & Transport
Service Business Consulting

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Selecting a system for growth

GI UK Medical was founded in 2019 to provide specialist endoscopic healthcare equipment mainly to the NHS. They also supply a large range of PPE to assist frontline medical staff against the COVID-19 pandemic.

Results at a glance

- Providing trust and confidence that the system selected is fit for purpose
- Taking the pain out of the tender process and supplier and stakeholder management
- Understanding the unique requirements that make your business stand out

A new business and growing fast their business systems were struggling to keep up with the pace. GI UK Medical needed to move away from Xero Financials to a more scalable business system able to meet more of their business needs and support their long term growth plans. Any new business system is a big investment in both time and resource, and GI wanted our help to give them confidence in the selection process.

We've been helping our clients do exactly this for many years and we've a robust approach that covers all aspects of the system selection process. We scale the process to the client and the task, meaning we can add value to the client no matter the size of the investment from full scale global Enterprise Systems to small scale CRM systems.

We have an extensive knowledge of business systems and solution providers, and being entirely system, technology and supplier agnostic, we can provide a completely independent service which focusses exclusively on the needs of the client. Our process has a number of stages. Firstly, we start by interviewing the executive team to understand the plans for the business. We then engage with the key stakeholders and process owners to identify the major pain points and areas of inefficiency that the new business system will need to address.

Using our expertise, we challenge the client to consider opportunities to improve their business processes. Sometimes this can lead to clients changing how they do things or 'business process re-engineering'. The key aspect of our approach is that it focusses on the unique or unusual requirements that characterise the client's business model and that makes them different. This helps us to identify the critical levels of functionality that the business system must provide and the priority that is given to each functional requirement. This in turn informs the scoring mechanisms that we apply to ensure that responses to any tenders are compared accurately and consistently.

"Waterstons expertise in regard to business systems and solution providers made the entire process as systematic and measured as possible. The process begins with top level requirements and comprises a thorough interrogation of business needs, functionality and scalability."

Andy Sheen
Chief Operating Officer

For GI the critical functional requirements were CRM and Traceability. The NHS is a multi-tiered organisation whose structure includes Trusts, Hospitals, Departments with clinicians and administrative contacts at all levels, so it was vital that the chosen solution managed information across complex client structures. As providers of medical equipment GI need to demonstrate that their processes allow them to track an individual device from source to point of use and vice versa.

An invitation to tender (ITT) was circulated to potential solution providers along with a list of functional requirements. A shortlist of the 3 highest scoring solutions was established and demonstrations were conducted that followed a set of fully scripted scenarios. These scenarios focussed on current GI pain points and gave them the opportunity to see how the proposed solutions would address their specific issues.

Each demo was scored by the attendees using an agreed methodology and the scores were consolidated. A clear winner was identified and chosen as the preferred solution provider – Codestone with SAP Business One. We contacted a couple of their reference sites to obtain independent first-hand experience of working with Codestone during the implementation phase and beyond.

"With the recent growth experienced, we found ourselves in need of improved ERP and CRM systems to support business needs and projected growth. Waterstons standard methodology goes above and beyond to identify the system requirements to fit our needs. Taking into account current pain points and desired areas of improvement, Waterstons process fine-tunes towards a selection of potential solution providers allowing us to objectively identify our preferred solution."

Andy Sheen
Chief Operating Officer

The outcome of this exercise for GI was the selection of the most appropriate solution and solution provider. GI felt that Codestone were an organisation they trusted, who wanted to help them maximise their investment in the software and continue to work with them on their digital transformation journey.