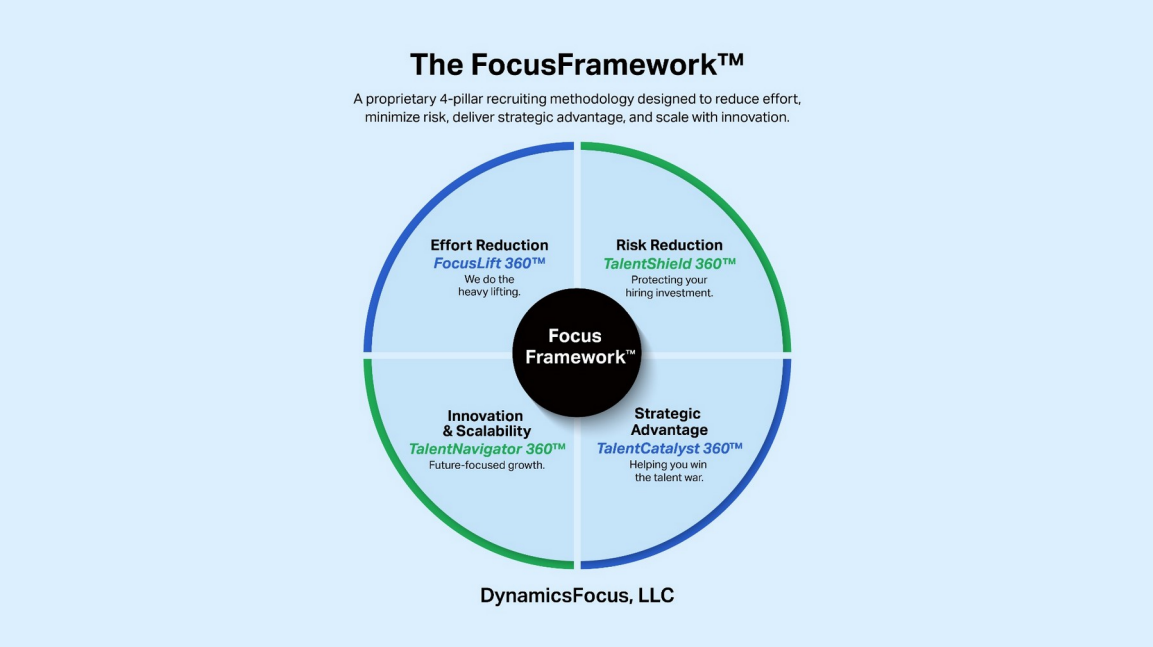
The Portfolio Company ERP Playbook

How PE/VC Firms De-Risk Technology Transitions Across Their Portfolio

Strategic Guide to NetSuite and Dynamics 365 Talent Planning



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Executive Summary

The Challenge: Your portfolio company closes. You mandate NetSuite or D365. Six months later: delays, 40% cost overruns, frustrated teams.

The Root Cause: Talent gaps, not software. Most acquisitions inherit 'talent debt' that threatens value creation.

This Playbook Delivers:

- Pre-acquisition ERP capability frameworks
- 90-day post-close talent roadmap
- Four flexible engagement models (Retained, Engaged, RPO, Contract)
- FocusFramework™ methodology (40% risk reduction)
- Real-world case studies with proven ROI
- Portfolio-wide strategies (30-40% cost savings)

Part 1: The Hidden Cost of ERP Talent Gaps

The $2.3M Hiring Mistake

A mid-market manufacturing company acquired by a PE firm hired a 'NetSuite Administrator' with 3 years of experience for $95K. Six months later: 6-month implementation delay, $450K in additional consulting fees, $1.8M in business disruption costs, and had to hire a Senior NetSuite Architect at $180K to rescue the project. Original hire left after 8 months.

Total Impact: $2.3M+

The problem: The hire had retail point-of-sale experience, not manufacturing operations. No implementation leadership, no Advanced Manufacturing module knowledge, no complex integration experience.

Why 67% of ERP Implementations Fail
According to Panorama Consulting's 2024 ERP Report, 67% of implementations fail to meet objectives or exceed budget by 30%+. Top drivers: inadequate internal expertise (73%), poor change management (61%), and insufficient process understanding (58%).

Software doesn't fail. People do.

Part 2: The PE/VC ERP Talent Framework

Understanding the target company's ERP capability during due diligence prevents costly surprises. Our 90-day post-close roadmap provides the structure to build the right team quickly:

Timeline	Key Activities
Days 1-30	**ASSESS & STABILIZE:** Meet current ERP team, document skill gaps, identify flight risks, review technical debt
Days 31-60	**PLAN & RECRUIT:** Define target org design, prioritize critical hires, launch recruiting, retention planning
Days 61-90	**EXECUTE & ONBOARD:** Close Priority 1 hires by Day 75, structured onboarding, establish ERP governance

Part 3: DynamicsFocus Service Offerings

PE/VC firms managing portfolio companies need flexibility. We offer four engagement models, each designed for specific hiring scenarios:

Choose Your Engagement Model

Service Model	Best For	Key Benefit	Fee Structure
Retained	Executive roles, confidential searches	100% passive talent access	3-part payment
Engaged	Critical roles, fast fill	Minimal upfront cost	Small engagement fee
RPO	Team building, portfolio-wide	30-40% cost savings	Monthly retainer
Contract	Project work, surge capacity	Immediate deployment	Hourly or block rate

Option 1: Retained Recruiting

When to Use: Executive-level roles (Business Applications Manager, ERP Director, VP of IT), confidential searches where discretion is paramount, mission-critical replacements, or any situation where you need to get it right the first time. Best for roles above $150K where the cost of a bad hire exceeds the investment in a thorough search.

Why Retained Matters:

Unlike contingency recruiting where multiple firms compete and candidates are 'shopped around,' retained search gives you exclusive access to our dedicated focus and the most coveted passive talent. We become true strategic partners in your success, not just resume providers.

What You Get:

- **Top Priority Focus:** Your search receives dedicated attention from our 25-year industry veteran. Every engagement is personally led—not delegated to junior recruiters. We commit to filling the role, not just 'trying our best.

- **Omnichannel Marketing Campaign:** We develop a comprehensive marketing program that spotlights your organization's strengths and the unique value of the opportunity. Outreach via targeted email, LinkedIn and social media, direct telephone contact, and featured placement on our website. This multi-pronged approach creates visibility with the exact candidates you need.

- **100% Market Access to Passive Talent:** We target the 75% of top-tier professionals who aren't actively looking, aren't working with other recruiters, and don't respond to job boards. These are employed, successful individuals who will only move for the right opportunity—and we have the relationships to engage them.

- **First Right of Refusal:** You receive the initial opportunity to review and interview candidates before they're presented to any other client. This exclusivity gives you competitive advantage in securing top talent.

- **Video Interview Presentations:** For shortlisted candidates, we provide recorded video interviews at time of introduction. This allows your team to evaluate communication style, technical depth, and cultural fit before investing time in formal interviews.

- **Personality Assessments:** AI-powered behavioral assessments ensure strong role fit and cultural alignment with your organization. We validate not just technical skills but also leadership style, team dynamics, and long-term retention factors.

- **Confidentiality & Discretion:** Essential for sensitive or replacement searches. We conduct all outreach and interviews with complete confidentiality, protecting both your organization's plans and candidate privacy.

- **Executive-Level Network:** 25 years building relationships with Microsoft Dynamics and NetSuite leaders at the highest levels. This isn't a database—it's a trusted network of professionals who take our calls.

- **Strategic Advisory:** Market insights on compensation trends, team structure recommendations, candidate availability analysis, and competitive intelligence to inform your hiring decisions.

CASE STUDY: Confidential D365 Finance Lead Replacement

Client: $180M manufacturing PE portfolio company

Challenge: ERP Director (15-year tenure) announced retirement. Highly confidential search. Needed senior D365 F&O leader with manufacturing expertise. Internal team couldn't know until replacement secured.

Solution: Retained search with full confidentiality. Targeted passive candidates only. Conducted all interviews off-site. Video presentations for finalist review.

Results: Hired Business Applications Manager at $185K. 45 days from kickoff to offer acceptance. 4-week overlap for knowledge transfer. Outgoing director praised transition. Zero business disruption.

Option 2: Engaged Recruiting

When to Use: Critical roles requiring specific ERP, CRM, or AI expertise where you need qualified candidates quickly. Ideal when supplementing internal recruiting efforts, when you need multiple candidates for immediate consideration, or when you want to minimize upfront investment while still accessing top talent. Best for mid-level roles ($100K-$160K) where speed and quality both matter.

How Engaged Differs from Contingency:

Traditional contingency recruiting is a race—multiple firms compete, candidates are presented to multiple companies simultaneously, and quality suffers. Our Engaged model requires a small upfront commitment that ensures we're truly partnered with you. You get our focused attention, rigorous screening, and candidates who are genuinely interested in YOUR specific opportunity—not just any job.

Our 5-Step Process:

1. **Role Analysis & Strategy:** We work closely with your team to understand the role's technical requirements, responsibilities, growth trajectory, and cultural fit criteria. We don't just take a job description—we understand the business context and the type of person who will thrive in your environment.

2. **Candidate Sourcing:** Using our extensive network of Microsoft Dynamics, NetSuite, ERP/CRM, and AI professionals, we identify both active candidates (who are looking) and passive candidates (who are employed but open to select opportunities). Our network gives us access to professionals who don't respond to typical recruiting outreach.

3. **Screening & Qualification:** Every candidate undergoes rigorous evaluation before presentation. We validate technical skills (not just resume claims), assess cultural fit and career motivations, conduct preliminary reference checks, and benchmark compensation expectations. Only the most qualified professionals who meet your specific criteria are presented.

4. **Comprehensive Candidate Profiles:** You receive detailed profiles including technical experience and implementation history, specific modules and industries, career objectives and motivations, current compensation and expectations, availability and notice period, and our assessment of strengths and potential concerns.

5. **Interview Support & Offer Guidance:** We coordinate all interview logistics, collect feedback from both sides, facilitate debriefing sessions, provide offer negotiation guidance, and manage the acceptance process. Our involvement doesn't end when you make an offer—we're with you through acceptance and start date.

Key Benefits:

- **Risk-Free Access:** Very limited upfront engagement fee ensures mutual commitment, but you only pay the full success fee if you hire. This protects your budget while ensuring we're invested in your success.

- **Speed & Quality:** Typically present qualified candidates within 10-15 days of engagement. Our pre-screening ensures you're not wasting time on unqualified candidates.

- **Targeted Expertise:** Every candidate is skill-validated for your specific technical requirements and industry context. We understand the difference between a NetSuite Financial Consultant and a NetSuite Advanced Manufacturing Consultant.

CASE STUDY: NetSuite Developer for Supply Chain Enhancement

Client: $90M distribution company, recent NetSuite implementation

Challenge: Needed NetSuite Developer for custom SuiteScript development. Internal recruiting struggling. Required advanced WMS integration experience. 30-day deadline to start project.

Solution: Engaged search model. Leveraged network of NetSuite developers. Pre-screened for SuiteScript 2.0 and WMS expertise. Presented 3 qualified candidates in 10 days.

Results: Hired at $145K. Started Day 28. Completed WMS integration 6 weeks ahead of schedule. Client engaged us for 2 additional contract developers for related projects.

Option 3: RPO Services

When to Use: Building entire ERP teams (5-15+ people), portfolio-wide talent initiatives across multiple companies, rapid scaling to support growth or new implementations, or when you need predictable recruiting budgets over 6-18 months. Ideal for PE/VC firms standardizing technology across portfolios or companies undergoing major ERP transformations requiring multiple concurrent hires.

Why RPO Makes Strategic Sense:

Traditional per-placement recruiting creates unpredictable costs that spike with each hire. For organizations hiring 5+ ERP professionals over 12-18 months, RPO delivers 30-40% cost savings while providing dedicated resources, consistent quality, and predictable monthly investments. Instead of managing multiple recruiting relationships, you have one strategic partner managing your entire ERP talent acquisition function.

Seven-Component Service Model:

1. **Dedicated Recruiting Team:** We assign specialized ERP recruiters who focus exclusively on your organization. This isn't a shared resource juggling 50 clients—this is YOUR team, operating as an extension of your HR function. They learn your business, culture, and technical requirements deeply, becoming true insiders who can effectively represent your employer brand.

2. **Candidate Sourcing & Engagement:** We leverage our extensive network of Microsoft Dynamics, NetSuite, ERP/CRM, and AI professionals, targeting both active and passive candidates. With RPO, we build candidate pipelines BEFORE roles open, reducing time-to-fill by 40-50%. Our reach extends to 87% passive candidates not accessible through traditional channels.

3. **Screening & Assessment:** All candidates undergo comprehensive evaluation: technical skills validation (hands-on, not just resume claims), cultural fit assessment designed for PE-backed environments, AI-powered behavioral assessments for team dynamics, and thorough reference checks before presentation. We ensure alignment with your organization's specific needs and growth trajectory.

4. **Interview Coordination & Offer Management:** We manage the entire interview process from scheduling through offer negotiation. This includes candidate preparation, feedback collection and synthesis, hiring team debriefings, offer strategy and structuring, and negotiation facilitation. This streamlined approach improves candidate experience and increases acceptance rates by 25-30%.

5. **Onboarding Support:** We assist with the critical transition period: resignation support and counteroffer mitigation, notice period engagement to maintain candidate commitment, pre-boarding communication to build excitement, first-day readiness coordination, and 30/60/90-day check-ins. This reduces administrative burden and ensures smooth starts, lowering early turnover risk.

6. **Scalable, Flexible Engagement:** Whether you need support for one critical role or building entire ERP teams across a dozen portfolio companies, our RPO model scales efficiently. We've successfully managed single-company buildouts (5-10 roles over 3-6 months), portfolio-wide initiatives (12+ roles across 8 companies), and ongoing partnership models (continuous hiring support). Resources scale up or down based on your hiring velocity.

7. **Vested Partnership Model:** Our unique financial structure provides predetermined, consistent, distributed monthly payments rather than large fee spikes with each hire. This creates budget predictability for CFOs and operating partners, aligned incentives where we succeed when you do, cashflow management advantages, reduced administrative overhead, and transparent cost-per-hire metrics. You manage accounts payable efficiently while we manage your talent acquisition function.

CASE STUDY: Portfolio-Wide Dynamics 365 Standardization

Client: Mid-market manufacturing PE firm, $2B AUM, 8 portfolio companies

Challenge: Mandated D365 F&O across portfolio. Each company needed 1-3 D365 professionals over 18 months (total: 15-20 hires). Traditional per-placement fees would exceed $450K. Needed coordinated approach.

Solution: 18-month RPO engagement. 3-person dedicated team. Standardized role profiles. Centralized candidate pipeline. Monthly retainer with vested partnership model.

Results: 17 placements across 8 companies in 16 months. Average 32 days to hire. 100% retention at 12 months. Total investment: $285K (37% savings vs. traditional). Operating partner praised coordination and quality. Renewed for Year 2.

Option 4: Contract & Project-Based Resources

When to Use: Need specialized subject matter expertise outside your core team, just closed a major deal requiring immediate deployment, managing an ERP/CRM implementation scheduled to complete within 12 months, surge capacity for critical projects, or expertise gaps that don't warrant permanent hires. Perfect for implementation projects, system upgrades, complex integrations, or temporary team augmentation during peak periods.

Why Contract Resources Accelerate Success:

Permanent hiring takes 45-90 days. Project timelines don't wait. Our contract network provides immediate access to elite ERP professionals who can start within days, not months. These aren't junior resources learning on your dime—they're senior experts with dozens to hundreds of implementations who deliver results from day one.

Our Contractor Network:

- **Elite Senior Professionals:** Our network consists of highly skilled ERP and CRM professionals with deep experience in Microsoft Dynamics 365, NetSuite, and AI-driven business applications across North America and Europe. Most have completed dozens to hundreds of successful implementations, upgrades, and integrations. These are practitioners who have chosen to operate strictly on a contract basis to provide organizations with scalable, specialized expertise when needed most.

- **Immediate Deployment Capability:** No hiring delays, no onboarding overhead, no cultural fit risk. Our contractors are accustomed to stepping into highly critical, time-sensitive projects and delivering results quickly. They thrive in environments where speed, accuracy, and domain knowledge are essential. Whether your project involves finance, supply chain, HR, sales automation, or AI-powered analytics, our professionals bring proven, hands-on experience.

- **Flexible Engagement Models:** Availability varies based on current commitments. Some contractors are available full-time (40+ hours/week) to manage large deployments or lead implementation teams. Others provide part-time support (10-20 hours/week) to augment existing teams, often focusing on development, configuration, or technical integration tasks. This flexibility allows you to scale resources precisely to project needs without overcommitting to full-time capacity.

- **Remote-Ready Expertise:** Many of our contractors are highly proficient at remote work, allowing for flexible engagement models with minimal ramp-up time. They're experienced at collaborating with distributed teams, managing projects virtually, and delivering results without requiring on-site presence. This reduces your facility overhead while maintaining productivity.

- **Access to Hidden Talent:** By leveraging DynamicsFocus' contract talent network, organizations gain access to top-tier Microsoft Dynamics and NetSuite professionals who aren't available through traditional staffing agencies. These experts are selective about engagements and respond to our outreach based on established relationships. This approach ensures you get the right skill set at the right time, without the delays or overhead of traditional hiring.

- **Proven Project Delivery:** Whether you need to accelerate deployment timelines, fill critical expertise gaps, bridge to permanent hires, provide surge capacity for peak periods, or scale delivery teams quickly, our contract and project-based resources provide a reliable, scalable, and results-driven solution. They've worked in PE-backed environments, understand tight timelines, and deliver under pressure.

Three Pricing Models:

- **Standard Hourly Rate:** Agreed upon at time of engagement, paid bi-weekly or monthly. Best for projects with uncertain scope or duration. Provides maximum flexibility to scale hours up or down based on project needs.
- **Monthly Block Rate:** Guaranteed block of hours at a reduced hourly rate, paid monthly. Ideal for ongoing projects requiring consistent support. Provides cost savings (typically 10-15% vs. standard hourly) and budget predictability.
- **Multi-Resource Project Pricing:** For projects requiring multiple contractors simultaneously, we offer even greater savings depending on length of engagement. Perfect for large implementations, system migrations, or portfolio-wide initiatives requiring coordinated team deployment.

CASE STUDY: Emergency NetSuite Architect for Go-Live Rescue

Client: $65M professional services firm

Challenge: NetSuite implementation 3 weeks from go-live. Original architect left unexpectedly. Critical integrations incomplete. Implementation partner overwhelmed. Risked $500K+ delay costs.

Solution: Contract NetSuite Solution Architect from our network. 25+ OneWorld implementations. Expert in SuiteScript and integrations. Available immediately. 6-week project-based engagement.

Results: Started within 48 hours. Completed integrations in 2.5 weeks. Go-live on schedule. Post-go-live stabilization support for 3 weeks. Client avoided delay costs and hired permanent architect with our help. Contractor available for future projects.

Part 4: The FocusFramework™ Process

Every engagement—regardless of service model—follows our proven 5-phase methodology:

Phase Breakdown:

1. **Discovery:** Deep dive on business, culture, requirements
2. **Campaign:** Targeted messaging to passive candidates
3. **Qualification:** Technical validation, cultural assessment
4. **Coordination:** Full logistics, debriefing, selection
5. **Onboarding:** Seamless transition to start date

Part 5: Compensation Benchmarking

Use as starting point. Adjust +15-25% for high-cost markets (NYC, SF, Seattle). Adjust -10-15% for startups. Add 10-20% premium for urgent fills.

Role	FTE Salary	Contract Rate
NETSUITE		
Administrator	$85K-$125K	$90-$120/hr
Functional Consultant	$105K-$145K	$110-$140/hr
Developer	$120K-$165K	$125-$160/hr
Solution Architect	$145K-$195K	$150-$185/hr
Business Applications Manager	$155K-$225K	$150-$200/hr
DYNAMICS 365		
Administrator	$80K-$120K	$85-$115/hr
Functional Consultant	$100K-$140K	$105-$135/hr
Technical Consultant	$115K-$155K	$120-$150/hr
Solution Architect	$140K-$190K	$145-$180/hr
Business Applications Manager	$155K-$225K	$150-$200/hr

Next Steps: Choose Your Path

Four Ways to Engage:

Executive Search	Retained for C-level, confidential, leadership
Critical Roles	Engaged to supplement internal, minimal upfront
Team Building	RPO for portfolio-wide, 30-40% savings
Project Work	Contract for immediate deployment, surge

Start With a Complimentary 72-Hour ERP Talent Audit

For post-acquisition portfolio companies

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Specializing Exclusively in NetSuite and Dynamics 365 Talent
Because ERP implementations succeed or fail based on the talent behind them