

EXECUTIVE BRIEFING

ERP SOFTWARE SELECTION CHECKLIST

FOR EXECUTIVE SPONSORS

An Executive Sponsor Review Tool Applied Within the Alentra Methodology



GOVERNED ERP
SELECTION DECISION

Grounded in Sponsor Intent, Governed Evidence,
Investment Quality, and Implementation Readiness

Powered by The CFO-TA, the Executive Sponsor Platform

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Selecting an ERP platform is one of the most consequential decisions within an Enterprise Transformation Program. The decision influences how the organization will operate, use data, make decisions, govern automation, structure accountability, deploy capital, integrate technologies, and pursue its intended Business Outcomes for years to come.

This checklist helps Executive Sponsors and authorized Decision Authorities assess whether the Sponsor Intent, evaluation criteria, requirements, demonstrations, evidence, candidate analysis, investment position, contractual commitments, and mobilization conditions required for a defensible ERP decision have been sufficiently established.



The checklist is a practical review tool applied within the Alentra Methodology. The Alentra Methodology governs the work, sequence, deliverables, decisions, and progression across Transformation Strategy, Solution Selection, Govern Implementation, and Prove Outcomes. The checklist consolidates ERP-specific review considerations addressed through the applicable steps of that authoritative 30-step methodology.

The CFO-TA is the Executive Sponsor Platform. It connects checklist responses to Sponsor Intent, methodology deliverables, Meaning-Aligned Requirements, candidate evidence, authorized decisions, contractual commitments, implementation conditions, and the governed artifact chain that preserves continuity throughout the Enterprise Transformation Program lifecycle.

How to Use This Checklist

Apply each checklist item when it becomes relevant through the applicable step of the Alentra Methodology. Record the evidence supporting the response and identify the Executive Sponsor or authorized Decision Authority responsible for resolving material gaps.

A checked item should confirm that the underlying intent, decision, requirement, boundary, condition, commitment, or evidence has been made explicit, reviewed by the appropriate authority, and preserved in the applicable methodology deliverable or governing artifact.

The review domains organize related ERP selection considerations for practical use. They do not create additional methodology steps, stages, phases, or decision gates.

Progression remains governed by the applicable Alentra Methodology step, deliverable requirements, Decision Authorities, and authorization conditions.

Sponsor Intent and Selection Readiness

Business Intent

- ☐ The business reason for considering a new ERP platform has been explicitly defined.
- ☐ The required Business Outcomes have been identified and authorized.
- ☐ Each Business Outcome describes the meaningful business change the Enterprise Transformation Program is expected to produce.

- ☐ The rationale for each Business Outcome has been documented.
- ☐ The Conditions of Success have been defined at the Enterprise Transformation Program level.
- ☐ The organization has identified the evidence and measures that will help validate whether authorized Business Outcomes are being achieved.
- ☐ The expected value of the ERP investment is connected to the Business Outcomes it must enable.
- ☐ Material assumptions influencing the expected value have been made explicit.
- ☐ The Executive Sponsor can explain why the ERP investment is required in business terms.
- ☐ The CFO-TA contains or references the current Sponsor Intent Assets governing the selection.

Scope Intent

- ☐ The business domains, processes, capabilities, operating units, legal entities, geographies, and user populations within scope have been identified.
- ☐ Material data, integration, reporting, security, regulatory, and architecture boundaries have been identified.
- ☐ Material exclusions and protected boundaries have been made explicit.
- ☐ Required scope, optional scope, deferred scope, and candidate-proposed scope can be distinguished.
- ☐ Known dependencies on other platforms, Enterprise Transformation Programs, operating changes, and organizational decisions have been documented.
- ☐ The Executive Sponsor has identified which scope decisions require direct Sponsor authorization.
- ☐ The selection team understands how candidate-recommended scope changes will be evaluated and authorized.
- ☐ The CFO-TA preserves the rationale and Decision Authority associated with material scope decisions.

Transformation Approach Intent

- ☐ The intended implementation posture has been established at the level required for ERP selection.
- ☐ The organization's position on standardization, configuration, customization, extension, and process redesign has been defined.
- ☐ The organization has identified where platform-standard practices are preferred and where business differentiation must be preserved.
- ☐ The intended roles of the software vendor, implementation partner, internal team, and other advisors have been defined.
- ☐ The intended approach to releases, sequencing, data conversion, integrations, testing, change enablement, and operational transition has been established at the level required for candidate evaluation.
- ☐ Candidate implementation approaches can be evaluated against an authorized Business-Side position.
- ☐ Material changes to Transformation Approach Intent require authorization by the appropriate Decision Authority.
- ☐ The CFO-TA preserves the current Transformation Approach Intent and authorized refinements.

Decision and Governance Conditions

- ☐ The Executive Sponsor and delegated Decision Authorities have been identified.
- ☐ Decision rights are explicit for requirements, scope, architecture, data, security, commercial terms, implementation approach, and candidate selection.
- ☐ Materiality thresholds identify which decisions require escalation.
- ☐ Exception and escalation paths have been established.
- ☐ The basis for scoring, weighting, evidence acceptance, and tradeoff authorization has been approved before candidate evaluation.
- ☐ Sponsor-owned decisions remain distinguishable from implementation management responsibilities.

- ☐ Material decisions preserve rationale, evidence, assumptions, dissent, consequences, and authorized tradeoffs.
 - ☐ The CFO-TA provides a governed environment for maintaining the selection decision record.
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Candidate Qualification and Evaluation Design

Candidate Qualification

- ☐ Each candidate demonstrates credible potential alignment with Sponsor Intent.
- ☐ Each platform can support the defined business domains and material scope boundaries.
- ☐ Relevant industry, regulatory, geographic, localization, security, data, and operational conditions have been considered.
- ☐ Material platform limitations have been identified.
- ☐ Native capabilities can be distinguished from configured, customized, extended, integrated, planned, and third-party-dependent capabilities.
- ☐ Dependencies on additional applications, integrations, data services, infrastructure, and partner-developed components have been identified.
- ☐ The proposed implementation partner has relevant capability, capacity, experience, leadership, and delivery credibility.
- ☐ The implementation partner's proposed role aligns with Transformation Approach Intent.
- ☐ Potential conflicts, incentives, commissions, referral arrangements, and commercial relationships that could influence recommendations have been disclosed.
- ☐ The Executive Sponsor can understand why each candidate was included or excluded.
- ☐ Candidate qualification evidence is preserved through The CFO-TA.

Evaluation Design

- ☐ The evaluation criteria have been approved before demonstrations and detailed scoring begin.

- ☐ Criteria weights reflect authorized Business Outcomes and Executive Sponsor priorities.
 - ☐ Mandatory conditions and non-compensating criteria have been identified.
 - ☐ Scoring guidance defines what each score represents.
 - ☐ Evaluators understand which decisions they are authorized to make.
 - ☐ The evaluation distinguishes documented facts, demonstrated capabilities, assumptions, dependencies, estimates, roadmap commitments, and opinions.
 - ☐ Platform capability and implementation partner capability can be evaluated separately and together.
 - ☐ The commercial structure and implementation approach are included in the evaluation.
 - ☐ Evidence quality influences the evaluation result.
 - ☐ Material uncertainty remains visible in the candidate assessment.
 - ☐ The evaluation design can be traced to Sponsor Intent through The CFO-TA.
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Meaning-Aligned Requirements, Demonstrations, and Evidence

Meaning-Aligned Requirements

- ☐ Requirements are connected to the Business Outcomes they support.
- ☐ Requirements are connected to the applicable Sponsor Intent Assets.
- ☐ Each material requirement explains why the required capability or operating behavior matters.
- ☐ Core Business Definitions are explicit where inconsistent terminology could change the meaning of a response.
- ☐ Decision Authorities, Decision Boundaries, Exception Rules, and Accountability Requirements are included where relevant.
- ☐ Evidence Requirements are identified for material candidate claims.

- ☐ Requirements distinguish mandatory needs from preferences and optional capabilities.
- ☐ Requirements preserve authorized scope boundaries.
- ☐ Requirements avoid embedding an incumbent process or candidate solution unless that constraint has been explicitly authorized.
- ☐ AI, automation, analytics, and agentic requirements include the authority, data, evidence, accountability, validation, escalation, and human-governance conditions required for their use.
- ☐ The CFO-TA preserves traceability from Meaning-Aligned Requirements to Sponsor Intent.

Sponsor-Controlled Demonstrations

- ☐ Demonstration scripts are created from Sponsor Intent and Meaning-Aligned Requirements.
- ☐ Every candidate must demonstrate the same required business scenarios.
- ☐ Required scenarios are completed before optional candidate capabilities are presented.
- ☐ Scripts define the business context, starting conditions, required actions, decisions, exceptions, outputs, and evidence.
- ☐ Demonstrations include realistic roles, data conditions, decision points, and exception conditions.
- ☐ Candidates identify which capabilities are native, configured, customized, extended, integrated, planned, or dependent on third parties.
- ☐ Unscripted claims and optional capabilities are recorded separately from required scenario performance.
- ☐ Evaluators score observed evidence against the approved standard.
- ☐ Presentation quality does not substitute for evidence of capability.
- ☐ Material questions, exceptions, and follow-up evidence requests are documented.
- ☐ The CFO-TA produces and preserves demonstration scripts, evaluation responses, evidence requests, and resulting decision records.

Governed Evidence

- ☐ Evidence standards define what candidates must provide to support material claims.
 - ☐ Evidence is classified by type, source, relevance, reliability, currency, and decision significance.
 - ☐ Candidate statements are distinguished from demonstrated, documented, independently validated, and contractually committed evidence.
 - ☐ Roadmap claims include expected timing, dependencies, conditions, and enforceability.
 - ☐ Reference information is evaluated against comparable organizational and implementation conditions.
 - ☐ Evidence gaps remain visible in scoring, risk evaluation, and decision materials.
 - ☐ Conflicting evidence is documented and resolved by the appropriate Decision Authority.
 - ☐ Material evidence can be traced to the requirement, criterion, assumption, or decision it supports.
 - ☐ Persistent evidence will be stored on the client's infrastructure.
 - ☐ The CFO-TA connects evidence to Sponsor Intent, evaluation criteria, decisions, commitments, and future validation requirements.
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Complete Candidate Evaluation and Investment Quality

The 15 ERP Software Selection Criteria

- ☐ Sponsor Intent Conformance

The candidate can operationalize the authorized Business Intent, Scope Intent, and Transformation Approach Intent.

- ☐ Business Outcome Support

The proposed solution can enable the Business Outcomes the Enterprise Transformation Program is authorized to produce.

☐ Conditions of Success

The candidate supports the transformation-level conditions required for Capital Protection, Outcome Confidence, AI & Data Integrity, and Compliance Proof.

☐ Meaning-Aligned Capability Fit

Candidate capabilities support the business meaning, operating behavior, decision conditions, and evidence expectations behind the requirements.

☐ Scope and Boundary Fit

The proposed solution respects authorized scope, exclusions, protected boundaries, dependencies, and future expansion conditions.

☐ Operating Model and Process Fit

The candidate supports the required operating model, accountability structure, process behavior, controls, and exception handling.

☐ Data, Integration, and Architecture Fit

The proposed solution supports required data meaning, data quality, integration, security, architecture, interoperability, and continuity conditions.

☐ AI, Automation, and Agentic Readiness

AI-enabled capabilities operate within explicit authority, data, evidence, accountability, monitoring, validation, escalation, and human-governance conditions.

☐ Platform Viability and Adaptability

The platform can support the required operating horizon, scale, change, upgrade posture, extensibility, and vendor direction.

☐ Implementation Partner and Delivery Credibility

The proposed partner demonstrates relevant capability, capacity, leadership, accountability, delivery discipline, and evidence-backed credibility.

☐ Expected Value Feasibility and Total Cost of Ownership

The expected value justifies the complete cost, risk, time, dependencies, and organizational commitment required to achieve it.

☐ Commercial and Contractual Enforceability

Material commitments supporting the selection decision can be translated into explicit and enforceable agreements.

☐ Risk, Assumption, and Dependency Exposure

Material risks, assumptions, dependencies, uncertainties, and confidence levels are visible and incorporated into the decision.

☐ Implementation Readiness and Investment Quality

The organization and candidate can satisfy the conditions required to mobilize responsibly and protect the investment.

☐ Governed Evidence and Decision Defensibility

The recommendation is supported by traceable evidence, explicit rationale, authorized tradeoffs, and a durable decision record.

Expected Value Feasibility and Total Cost of Ownership

☐ Expected value is traced to authorized Business Outcomes.

☐ Value assumptions, timing, confidence, dependencies, and expected durability are explicit.

☐ Total Cost of Ownership includes software, subscriptions, implementation, integrations, extensions, data, infrastructure, testing, security, internal resources, change enablement, support, upgrades, governance, ongoing operations, risk exposure, and transition costs.

☐ Included, excluded, deferred, candidate-borne, and client-borne costs are clearly distinguished.

☐ Material uncertainty remains visible rather than being absorbed into a single estimate.

☐ Candidate positions are compared across a consistent analysis horizon.

☐ Expected value, Total Cost of Ownership, timing, risk exposure, dependencies, and outcome confidence are evaluated together.

☐ The Executive Sponsor has authorized the investment position and its governing assumptions.

☐ The CFO-TA preserves the relationship between the investment analysis, Sponsor Intent, evidence, decisions, and future outcome validation.

Risk, Assumption, Dependency, and Tradeoff Review

- ☐ Material candidate and implementation risks have been identified.
 - ☐ Assumptions influencing scope, cost, timing, value, capacity, or technical feasibility have been documented.
 - ☐ Dependencies on client decisions, resources, data, integrations, third parties, and other Enterprise Transformation Programs are visible.
 - ☐ Confidence levels are explicit where conclusions depend on incomplete evidence.
 - ☐ Accepted risks have accountable owners, mitigations, monitoring expectations, and escalation triggers.
 - ☐ Mandatory conditions remain protected from unrelated scoring strengths.
 - ☐ Material tradeoffs are documented separately from aggregate scoring.
 - ☐ The consequences of each recommended tradeoff are explicit.
 - ☐ The appropriate Decision Authority has authorized each material tradeoff.
 - ☐ Dissenting positions and unresolved evidence gaps are visible to the Executive Sponsor.
 - ☐ The recommendation explains why the preferred candidate represents the strongest complete transformation position.
 - ☐ The CFO-TA preserves each material tradeoff, its rationale, supporting evidence, Decision Authority, consequences, and required follow-through.
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Selection Commitments and Contract Alignment

- ☐ The Statement of Work is traceable to Sponsor Intent, authorized scope, applicable Meaning-Aligned Requirements, and the selected implementation approach.
- ☐ Material demonstration claims and proposal commitments are incorporated into enforceable agreements where appropriate.
- ☐ Platform vendor, implementation partner, subcontractor, and client responsibilities are explicit.

- ☐ Scope inclusions, exclusions, assumptions, dependencies, acceptance conditions, and change mechanisms are clear.
 - ☐ Required roles, named leadership, capacity commitments, and replacement conditions are defined.
 - ☐ Data, integration, security, testing, migration, change enablement, and operational transition responsibilities are explicit.
 - ☐ Required evidence, reporting, documentation, validation, and decision records are addressed.
 - ☐ AI and agentic capabilities include explicit authority, data-use, monitoring, validation, escalation, accountability, and human-governance requirements.
 - ☐ Commercial terms support the required implementation behavior and accountability structure.
 - ☐ Contractual protections address material risks identified during evaluation.
 - ☐ Approval authorities have reviewed remaining assumptions, dependencies, risks, and tradeoffs.
 - ☐ The final agreements preserve the material basis of the selection decision.
 - ☐ The CFO-TA provides traceability between Sponsor Intent, selected capabilities, evidence, decisions, and contractual commitments.
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Implementation Mobilization Readiness

- ☐ The Executive Sponsor has authorized the selected platform, implementation partner, commercial structure, and implementation approach.
- ☐ Sponsor Intent reflects material decisions and refinements made during selection.
- ☐ Approved Business Outcomes, Conditions of Success, Scope Intent, and Transformation Approach Intent remain accessible to the implementation team.
- ☐ Decision Authorities, escalation paths, Exception Rules, and materiality thresholds are active.
- ☐ Sponsor-owned decisions remain distinguishable from implementation management responsibilities.

- ☐ Required internal leaders, subject-matter experts, process owners, data owners, and Decision Authorities have sufficient capacity.
 - ☐ Initial implementation dependencies, risks, assumptions, and readiness conditions have assigned owners.
 - ☐ The implementation roadmap reflects authorized Units of Transformation, sequencing, dependencies, progression requirements, and evidence expectations.
 - ☐ The Sponsor Intent Validation Plan defines the planned validation activities required to assess Sponsor Intent throughout implementation and operations.
 - ☐ Sponsor Intent Test Cases can validate Sponsor Intent Assets, Conditions of Success, Decision Boundaries, Exception Rules, Accountability Requirements, and Evidence Requirements.
 - ☐ Monitoring expectations have been established.
 - ☐ Validation will occur through planned events defined by the Sponsor Intent Validation Plan.
 - ☐ Continuous improvement can refine Sponsor Intent Assets as decisions are made, assumptions change, evidence develops, and operating conditions evolve.
 - ☐ Persistent evidence will be stored on the client's infrastructure.
 - ☐ The selected agreements, decision record, evaluation evidence, and governing artifacts are available to the implementation team.
 - ☐ The CFO-TA can support Sponsor Intent continuity across Govern Implementation and Prove Outcomes.
 - ☐ The Executive Sponsor can monitor whether the Enterprise Transformation Program continues to operate against authorized Sponsor Intent.
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Final Executive Sponsor Authorization

Before authorizing the ERP investment, the Executive Sponsor should be able to explain the decision in business terms. The explanation should connect the required Business Outcomes to the selected platform, implementation partner, commercial structure,

implementation approach, expected value, Total Cost of Ownership, principal risks, authorized tradeoffs, contractual protections, and mobilization conditions.

A defensible ERP decision requires explicit Sponsor Intent, disciplined comparison, governed evidence, visible uncertainty, authorized tradeoffs, enforceable commitments, and a durable explanation of why the selected candidate represents the strongest complete transformation position. The CFO-TA helps preserve that explanation as an authoritative decision record connected to the artifacts governing implementation and outcome validation.

- ☐ We can state the Business Outcomes this investment is expected to produce.
- ☐ We can explain how the selected candidate supports Sponsor Intent.
- ☐ We can identify the evidence supporting the material selection claims.
- ☐ We can distinguish demonstrated capabilities from assumptions, estimates, roadmap commitments, and third-party dependencies.
- ☐ We understand the complete Total Cost of Ownership.
- ☐ We understand the expected value, timing, confidence, dependencies, and durability assumptions.
- ☐ We know the principal risks, assumptions, dependencies, and unresolved uncertainties.
- ☐ We have explicitly authorized the material tradeoffs.
- ☐ We have translated critical selection commitments into enforceable agreements.
- ☐ We have confirmed implementation mobilization readiness through the applicable Alentra Methodology work.
- ☐ We can preserve and govern Sponsor Intent throughout implementation and operations.
- ☐ We can defend why this investment is the right decision for the organization.
- ☐ The CFO-TA preserves the Sponsor Intent, evidence, decisions, commitments, and validation requirements supporting the authorization.

Executive Sponsor Review Summary

Enterprise Transformation Program:

Executive Sponsor:

Review Date:

Current Alentra Methodology Step:

ERP Platform Candidates:

Implementation Partner Candidates:

Review Status

- ☐ Sponsor Intent requires further definition or refinement.
- ☐ Material candidate evidence remains outstanding.
- ☐ Material risks, assumptions, or dependencies require resolution.
- ☐ Material tradeoffs require Decision Authority review.
- ☐ Contractual commitments require further alignment.
- ☐ Implementation mobilization conditions require further work.
- ☐ The applicable Alentra Methodology requirements have been satisfied for the decision under review.

Material Conditions Requiring Resolution

1. _____

Owner: _____ Decision Date: _____

2. _____

Owner: _____ Decision Date: _____

3. _____

Owner: _____ Decision Date: _____

4. _____

Owner: _____ Decision Date: _____

5. _____

Owner: _____ Decision Date: _____

Executive Sponsor Decision

☐ Authorized to proceed in accordance with the applicable Alentra Methodology requirements.

☐ Conditionally authorized subject to the documented conditions.

☐ Further evidence or decision work is required before authorization.

Decision Rationale:

Authorized Conditions and Tradeoffs:

Executive Sponsor Signature:

Date:

Use The CFO-TA to Govern the ERP Selection Decision

The CFO-TA is the Executive Sponsor Platform. It is a Business-Side platform purpose-built for Executive Sponsors responsible for major transformation investments. The platform helps Executive Sponsors govern their three Sponsor-owned responsibilities: Business Intent, Scope Intent, and Transformation Approach Intent.

Together, these responsibilities form Sponsor Intent, the Executive Sponsor-owned expression of purpose and foundation of the Transformation Definition. The CFO-TA supports the Executive Sponsor through guidance, methodology, authoring, analysis, deliverable production, validation, review, coordination, decision support, continuity, and Sponsor Intent Lifecycle Management across the Enterprise Transformation Program lifecycle.

During ERP selection, The CFO-TA helps progressively define Sponsor Intent, establish Meaning-Aligned Requirements, create Sponsor-controlled demonstration and evidence scripts, evaluate complete candidate positions, assess Expected Value Feasibility and Total Cost of Ownership, govern material tradeoffs, document authorized decisions, align contractual commitments, and preserve the basis of the selection decision through implementation and operations.

Sponsor Intent Lifecycle Management Studio is a major platform capability used to establish, preserve, validate, monitor, improve, and prove Sponsor Intent. The CFO-TA applies this checklist within the Alentra Methodology and connects its findings to the authoritative 30-step methodology, governed deliverables, Decision Authorities, evidence, commitments, and outcome validation requirements.

The ERP Selection Decision Should Remain Connected to the Business Purpose It Must Serve

A defensible ERP decision is grounded in explicit Sponsor Intent, disciplined comparison, governed evidence, visible uncertainty, authorized tradeoffs, realistic value and cost analysis, enforceable commitments, and confirmed implementation readiness.

Use The CFO-TA to apply the ERP Software Selection Checklist within the Alentra Methodology and preserve the authoritative basis of the decision throughout the Enterprise Transformation Program lifecycle.

People compensated for ambiguity. Autonomous agents amplify it.

Request a Confidential ERP Selection Briefing

Determine Whether Your ERP Selection Decision Is Grounded in Sponsor Intent, Governed Evidence, and Investment Quality

If your organization is preparing to select, contract for, or implement a major ERP platform, Alentra Advisory can help your leadership team determine whether the proposed decision is sufficiently aligned with Sponsor Intent, supported by governed evidence, economically justified, contractually protected, and ready to advance through the Alentra Methodology.

ERP selection determines far more than which software the organization will acquire. It materially influences operating processes, data structures, decision rights, implementation scope, commercial commitments, organizational change, AI enablement, Total Cost of Ownership, and the Business Outcomes the Enterprise Transformation Program can produce.

The CFO-TA helps Executive Sponsors apply the Alentra Methodology to the ERP selection decision. It connects Business Intent, Scope Intent, and Transformation Approach Intent to Meaning-Aligned Requirements, Sponsor-controlled demonstrations, candidate evidence, evaluation criteria, value and cost analysis, authorized tradeoffs, contractual commitments, implementation conditions, and future outcome validation.

A confidential ERP Selection Briefing will help your leadership team:

- Determine whether Sponsor Intent is sufficiently explicit to govern the ERP selection decision
- Evaluate whether Business Outcomes, Conditions of Success, scope boundaries, and Transformation Approach Intent are reflected in the evaluation

- Assess whether the shortlisted platforms and implementation partners are being evaluated against a common Business-Side standard
- Determine whether Meaning-Aligned Requirements preserve the business purpose behind requested capabilities
- Evaluate whether vendor demonstrations follow Sponsor-controlled scripts and produce decision-relevant evidence
- Distinguish native, configured, customized, extended, integrated, planned, and third-party-dependent capabilities
- Assess whether the 15 ERP Software Selection Criteria are being applied to the complete candidate position
- Evaluate whether expected value justifies the complete Total Cost of Ownership, risk, timing, dependencies, and organizational commitment
- Identify material assumptions, evidence gaps, dependencies, risks, and tradeoffs requiring Executive Sponsor attention
- Determine whether material selection claims and commitments are reflected in the contract and Statement of Work
- Assess whether the organization and selected candidate are ready to mobilize implementation
- Understand how The CFO-TA can preserve Sponsor Intent, evidence, decisions, commitments, and validation requirements throughout implementation and operations

Request a Confidential ERP Selection Briefing

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About Tim Hourigan

Tim Hourigan

Founder and Chief Business-Side Advisor

Alentra Advisory

Tim Hourigan is an enterprise transformation advisor with more than 35 years of experience leading and supporting more than 185 Enterprise Transformation Programs spanning ERP, CRM, analytics, data, AI-enabled operations, automation, and business process modernization.

Tim originated Business Intent Design and created The CFO Transformation Agent, The CFO-TA, the Executive Sponsor Platform. The platform helps Executive Sponsors govern their three Sponsor-owned responsibilities: Business Intent, Scope Intent, and Transformation Approach Intent. Together, these form Sponsor Intent, the Executive Sponsor-owned expression of purpose and foundation of the Transformation Definition.

The CFO-TA provides guidance, methodology, authoring, analysis, deliverable production, validation, review, coordination, decision support, continuity, and Sponsor Intent Lifecycle Management across the Enterprise Transformation Program lifecycle. During ERP selection, the platform helps Executive Sponsors connect Sponsor Intent to Meaning-Aligned Requirements, Sponsor-controlled demonstrations, candidate evidence, evaluation decisions, contractual commitments, implementation conditions, and outcome validation.

Sponsor Intent Lifecycle Management Studio is a major platform capability used to establish, preserve, validate, monitor, improve, and prove Sponsor Intent. A governed artifact chain operationalizes Sponsor Intent throughout the Enterprise Transformation Program lifecycle and preserves the basis of the ERP selection decision as participants, decisions, assumptions, evidence, and operating conditions change.

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