

# Evaluating ERP & Tech Stack Options

A Practical Framework for Controllers and CFOs

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TXCPA Houston STARS Conference | May 2026

*Moderated by Arthur Forbus | Changing the Face of Finance (CFOF)*



# Today's Agenda

Strategy Before Tech.

*Every time*

1

## Context

When ERP change is (and isn't) the answer

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## Readiness

What has to be true before you evaluate

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3

## Evaluation

How to think about selection and the full tech stack

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4

## Execution

What goes wrong and how to lead through it

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5

## Closing

Lessons, advice & audience Q&A

# Learning Objectives

*CPE Credit Session*

**01**

Evaluate key signals that indicate when an ERP change is truly warranted — and when the real issue lies in process, data, or change readiness instead.

**02**

Identify the most common mistakes finance teams make during ERP evaluation and selection, and describe how to structure a finance-led process that avoids them.

**03**

Apply a practical framework for assessing readiness across strategy, people, process, technology, and data before committing to a technology evaluation.

**04**

Describe how Controllers and CFOs can jointly lead a disciplined evaluation process and maintain financial controls and close integrity during implementation.

MEET YOUR MODERATOR

# Arthur Forbus

*Founder & CEO | Changing the Face of Finance (CFOF)*

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- 30+ years of expertise in CPM + Data & Analytics
- Guides CFOs and finance leaders through strategy, people, process, technology, and data
- Creator of the Compass Method™ — a practical framework for finance transformation
- Prosci Certified Change Management Professional
- BBA – Accounting, UT Austin
- Member TXCPA Houston, CFO Controller Peer Group & Accounting Disciplines committees
- Member M&A Forum Houston



# Meet the Panelists



**Victor Kohanski**

*Chief Financial Officer*

**Fenix Solutions, LLC**

- CFO of Fenix Solutions, LLC
- 30+ years financial leadership across public & private companies, large and small
- Experience spans corporate finance roles and large consulting firms
- Veteran of multiple ERP implementations
- Pattern-recognition on what separates successful projects from struggling ones



**Matt Sicinski**

*SVP & Chief Accounting Officer*

**Summit MidStream**

- CAO at Summit Midstream since 2022
- Prior CAO at Venari Resources; accounting, finance, & commercial roles at Southwestern Energy
- 7+ years public accounting with Arthur Andersen and E&Y (Houston)
- BBA & MBA in Accounting, Angelo State University; CPA
- U.S. Navy Reserve veteran (Afghanistan)



**Dave Harger**

*VP Information Technology*

**AirX Climate Solutions**

- 30+ years leading ERP transformations end-to-end
- Global digital transformation, ERP consolidation, and modernization expertise
- Trusted advisor to Boards on risk, change leadership, and execution
- Industries: manufacturing, distribution, oilfield services, mining

# 01

## Context: When ERP Change Is (and Isn't) the Answer

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- What are the real signals that an ERP evaluation is warranted?
- How often do organizations confuse ERP limitations with process or data problems?
- How should finance leaders think about the full tech stack not just the ERP?

01

# 02

## Readiness: What Has to Be True Before You Evaluate

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- What does finance readiness actually look like and how do you know when you're not there yet?
- What role should IT play in a finance-led evaluation and where does that collaboration break down?
- How do you honestly assess change readiness before committing to an evaluation?

02

# 03

## Evaluation: Selection, Vendors & Framework

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- How do you structure an evaluation to avoid being led by vendor narratives?
- What are the most common mistakes during evaluation that create downstream problems?
- How do you evaluate long-term scalability and total cost of ownership in a mid-market environment?

03

# 04

## Execution: What Goes Wrong (and How to Lead Through It)

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- Where does CFO leadership make the biggest difference during implementation?
- What are the early warning signs that an ERP implementation is getting off track?
- How do you maintain close integrity and financial controls while managing two environments simultaneously?

04

# 05

## Closing: Lessons, Advice & What's Next

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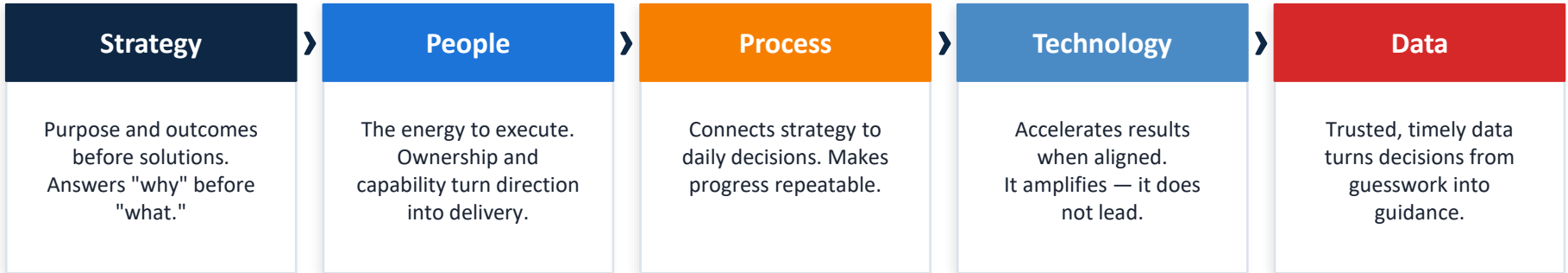
- If you could go back and change one decision, what would it be?
- What advice would you give a CFO or Controller before they talk to their first vendor?
- Audience Q&A

05

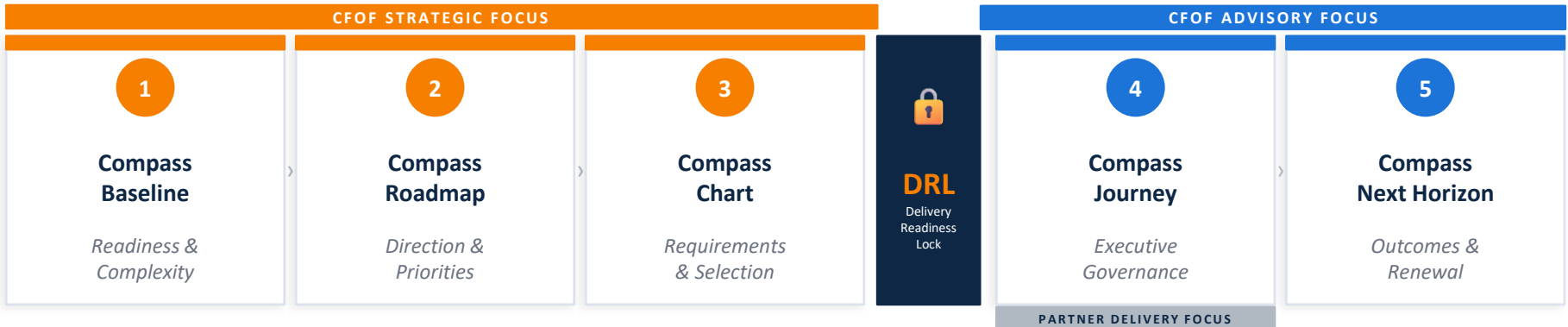
# The Compass Method™

CPM + Data & Analytics · Strategic Change Path

## Compass Dimensions™ · THE 5-DIMENSION BEARING



## Compass Phases™ · THE 5-PHASE PATH



*Strategy before tech · Readiness before execution · Outcomes before iteration.*

# What's Your Future?

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- Do you know where your ERP and tech stack gaps actually live or are you guessing?
- Is your finance team ready to lead a disciplined evaluation, or will the vendors lead it for you?
- Have you measured readiness across strategy, people, process, technology, and data before the first demo?

# Thank You

*Continue the conversation with CFOF*

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- ▶ Take the Compass Baseline — measure readiness across all five dimensions
- ▶ Schedule a Compass Insights Call — explore where your team stands today
- ▶ Design your Compass Roadmap — turn assessment into a plan



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