



## Case Study – Software Selection

### Client

The Client, located in Edina, MN, is one of the largest retail rare and collectible coin marketers in the country serving collectors worldwide through its multiple divisions.

### Challenge



The Client wanted to replace their legacy ERP system, which no longer met their needs. Charter Solutions performed a software selection project to research, select, negotiate, and acquire a best fit, best value solution. Purge/merge functionality, plus the ability to maintain a call list of over 400,000 coin collectors worldwide during call-center interactions was a critical requirement. In addition, real-time inventory and order visibility for multi-channel call center locations, Web store front, and fulfillment operations was another key issue to be solved.

### Solution

Charter Solutions conducted a software selection project that included the following steps to drive to a best fit, best value solution for the Client:

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- Determined requirements and screened vendors
  - Developed RFP and demonstration scripts
  - Facilitated vendor presentations, site visits, and evaluations
  - Coordinated/implementation planning sessions
  - Negotiated contracts and supported final software purchase activities

### Technology

The team selected Junction Multi Channel Retail (MCR™), which specializes in multi-channel retail call-center support and is based on Microsoft .NET technology. JunctionMCR™ measures marketing effectiveness, customer service, and streamlining order fulfillment while providing control and integration of processes, systems, and channels.

### Benefits



Charter Solutions led a team of the Client's core members through the selection process and successfully hit the target. Creating leverage during the vendor's quarter close, the team negotiated and selected the best fit, most current technology in the marketplace for well under the going price for a company this size.

Charter Solutions provided strategic guidance in the following areas:

- TCO: Saved money on best/final price, well under the targeted budget
- Great functional fit: Clearly acquired the best fit vendor
- Selection project delivered on time and within budget

Charter Solutions used its proven, structured SW selection methodology, shortened the process to match the vendor quarter close, drove the decision timeline using proven templates, and a gated decision process with client leadership.



**Charter Solutions, Inc.**

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