ERP Readiness Checklist

Is Your Business Ready for a Modern ERP System?

Most businesses don't realize they've outgrown their current systems until operational problems begin slowing growth, reducing visibility, and creating costly inefficiencies.

This checklist helps you identify the warning signs, evaluate your current processes, and determine whether it's time to move to a modern ERP platform.

Operational Efficiency

Manual Processes

- ☐ Employees manually enter the same data into multiple systems
- ☐ Teams rely heavily on spreadsheets for reporting
- ☐ Approval processes are handled through email or paper
- ☐ Reporting requires significant manual work
- ☐ Employees spend excessive time correcting data errors

Warning Sign: If you checked 3 or more boxes, your business may be losing significant productivity to disconnected systems.

Financial Visibility

Financial Reporting & Accounting

- ☐ Month-end close takes longer than expected
- ☐ Financial reports are difficult to generate in real time
- ☐ Budgeting and forecasting are inconsistent
- ☐ Departments operate with limited financial visibility
- ☐ You lack consolidated reporting across locations or entities

Warning Sign: Limited financial visibility makes it difficult to make confident business decisions at scale.

Inventory & Supply Chain

Inventory Management Challenges

- ☐ Inventory counts are frequently inaccurate
- ☐ Stockouts or overstocking occur regularly
- ☐ Purchasing decisions rely on guesswork
- ☐ Warehouse and accounting systems are disconnected
- ☐ Inventory visibility across locations is limited

Warning Sign: Inventory inefficiencies directly impact profitability, customer satisfaction, and cash flow.

Growth & Scalability

Business Growth Challenges

- ☐ Your current software struggles to support growth
- ☐ New locations or entities are difficult to manage
- ☐ Employees create workarounds to compensate for system limitations
- ☐ Operational complexity increases faster than revenue
- ☐ Leadership lacks real-time business visibility

Warning Sign: If your systems cannot scale with your operations, growth becomes increasingly difficult and expensive.

Customer & Sales Operations

Customer Service & Order Management

- ☐ Order processing is slower than expected
- ☐ Customer information exists in multiple systems
- ☐ Sales and operations teams are disconnected
- ☐ Customers experience fulfillment delays
- ☐ Reporting on customer activity is difficult

Warning Sign: Disconnected systems reduce operational responsiveness and negatively impact customer experience.

Technology & Integration

Current Technology Environment

- ☐ Multiple software systems do not integrate properly
- ☐ Data synchronization issues are common
- ☐ Legacy systems are difficult to maintain
- ☐ Reporting requires exporting and combining data manually
- ☐ Your business lacks a centralized operational platform

Warning Sign: Disconnected technology environments create long-term operational risk and inefficiency.

YOUR ERP READINESS SCORE

0-5 Checks	Your systems may still support your current operational needs, but future growth challenges could emerge soon.
6-12 Checks	Your business is likely experiencing operational inefficiencies that modern ERP systems can solve.
13+ Checks	Your business is likely ready for ERP modernization. Operational bottlenecks and system limitations are likely affecting profitability and scalability.

What a Modern ERP System Can Help You Achieve

Improved Efficiency	Automate repetitive tasks and reduce manual work
Real-Time Visibility	Access accurate reporting across finance, operations, inventory, and sales
Better Decision-Making	Use centralized business data to improve forecasting and planning
Scalable Operations	Support business growth without adding operational complexity
Stronger Collaboration	Connect departments through one unified system

Why Businesses Choose Clients First to Guide Your ERP Journey

The Right ERP. A Proven Approach. A Partner You Can Trust.

An ERP decision affects every part of your organization. You need more than software. You need an experienced partner who understands your business, gives you honest guidance, and stays involved long after go-live.

Clients First provides tailored, scalable ERP solutions designed around your operational requirements, business priorities, and budget.

Because we support multiple ERP platforms, our recommendations begin with what is best for your business, not a predetermined product.

30+ years serving hundreds of organizations with honest, straight-forward support

It's designed for growing businesses that need:

- ☐ Operational visibility
- ☐ Scalability
- ☐ Automation
- ☐ Better reporting
- ☐ Improved efficiency

NEXT STEP: BOOK AN ERP READINESS ASSESSMENT ENGAGEMENT

A readiness assessment helps identify:

- ☐ Operational bottlenecks
- ☐ Reporting gaps
- ☐ Integration challenges
- ☐ Growth limitations
- ☐ ERP opportunities

During the assessment, we review:

- ☐ Your current systems
- ☐ Workflows
- ☐ Reporting needs
- ☐ Operational goals
- ☐ Implementation priorities

Schedule Your ERP Readiness Assessment Today

CONTACT US

Discover which ERP is the right fit for your business. 866-677-6290