

Manufacturing ERP Readiness Checklist

Is Your Manufacturing Business Ready for ERP?

As manufacturers grow, spreadsheets, disconnected systems, and manual processes often become barriers to efficiency, profitability, and customer satisfaction.

Use this checklist to evaluate whether your current systems can support your growth, or whether it is time to consider an ERP solution like SAP Business One.

Inventory & Warehouse Management

- ☐ Inventory counts are consistently accurate
- ☐ We have real-time visibility into inventory levels
- ☐ Inventory shortages rarely disrupt production
- ☐ Excess inventory is not tying up unnecessary cash
- ☐ We can easily track inventory across locations
- ☐ We have confidence in our purchasing decisions

Score Yourself: If you checked fewer than 4 boxes, inventory visibility may be limiting operational performance.

Production & Operations

- ☐ Production schedules are managed in a centralized system
- ☐ Production managers have real-time visibility into work orders
- ☐ Material shortages rarely delay production
- ☐ Bills of materials are accurate and easy to maintain
- ☐ Production costs are easy to track and analyze
- ☐ Production planning is proactive rather than reactive

Score Yourself: If you checked fewer than 4 boxes, production planning inefficiencies may be impacting profitability.

Purchasing & Supplier Management

- ☐ Purchasing decisions are based on accurate demand information
- ☐ Supplier performance is tracked consistently
- ☐ Purchase orders are managed through a centralized system

- ☐ Purchasing and inventory teams share the same information
- ☐ Material availability is visible before production begins
- ☐ Procurement processes are standardized

Score Yourself: If you checked fewer than 4 boxes, purchasing inefficiencies may be increasing costs and operational risk.

Financial Visibility

- ☐ Financial reports are available when needed
- ☐ Month-end close is completed efficiently
- ☐ Financial and operational data are connected
- ☐ Management can access real-time business performance information
- ☐ Product profitability can be accurately measured
- ☐ Reporting does not require extensive spreadsheet manipulation

Score Yourself: If you checked fewer than 4 boxes, limited financial visibility may be slowing decision-making.

Technology & Systems

- ☐ Information only needs to be entered once
- ☐ Departments work from a single source of truth
- ☐ Critical processes do not rely on spreadsheets
- ☐ Data flows automatically between systems
- ☐ Employees can easily access the information they need
- ☐ Current systems can support future growth

Score Yourself: If you checked fewer than 4 boxes, disconnected systems may be creating unnecessary complexity.

Growth & Scalability

- ☐ Our current systems support planned growth initiatives
- ☐ Adding users, locations, or product lines is manageable
- ☐ Reporting scales with the business
- ☐ Management has visibility into operational performance
- ☐ Growth is not increasing administrative workload
- ☐ We are confident our systems can support us over the next 3 to 5 years

Score Yourself: If you checked fewer than 4 boxes, your current systems may not be ready for the next stage of growth.

YOUR ERP READINESS SCORE

31-36 Checked Boxes

Your systems appear to be supporting current operations effectively. Continue evaluating opportunities for optimization and scalability.

21-30 Checked Boxes

Some operational challenges may be limiting efficiency and visibility. An ERP assessment may help identify opportunities for improvement.

20 or Fewer Checked Boxes

Your business may be experiencing significant operational constraints that ERP software can help address. This is often the stage where manufacturers begin evaluating SAP Business One and other ERP solutions.

Common Warning Signs Manufacturers Shouldn't Ignore

- Inventory shortages regularly impact production
- Production schedules change constantly
- Reporting depends heavily on spreadsheets
- Employees enter the same information multiple times
- Purchasing decisions rely on tribal knowledge
- Financial and operational data do not align
- Management lacks real-time visibility into performance
- Growth is creating operational complexity

If several of these challenges sound familiar, it may be time to evaluate whether your current systems can support your long-term business goals.

NEXT STEP: SCHEDULE A MANUFACTURING ERP ASSESSMENT

Clients First Business Solutions helps manufacturers evaluate their operational workflows, identify system limitations, and determine whether SAP Business One is the right fit for their business.

During Your Assessment, We'll Review:

- ✓ Inventory management processes
- ✓ Production planning workflows
- ✓ Purchasing and supplier management
- ✓ Financial reporting requirements

- ✓ **Growth objectives**
- ✓ **ERP implementation considerations**

Schedule Your Manufacturing ERP Assessment Today

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