



ERP PRE-SELECTION BUSINESS ANALYSIS

Choosing the right ERP system is a big deal for any manufacturer.

There are a lot of option out there, but there is no such thing as a one-size-fits-all solution. This worksheet and checklist go with our eBook: How to Select the Right ERP. The exercises are straightforward, and meant to get you thinking about your priorities and goals before diving into our proven ERP selection process.

TOP 3 GOALS YOU WANT TO ACHIEVE IN THE NEAR-TERM:

1. _____
2. _____
3. _____

TOP 3 THINGS YOU NEED TO IMPROVE TO HIT YOUR GOALS:

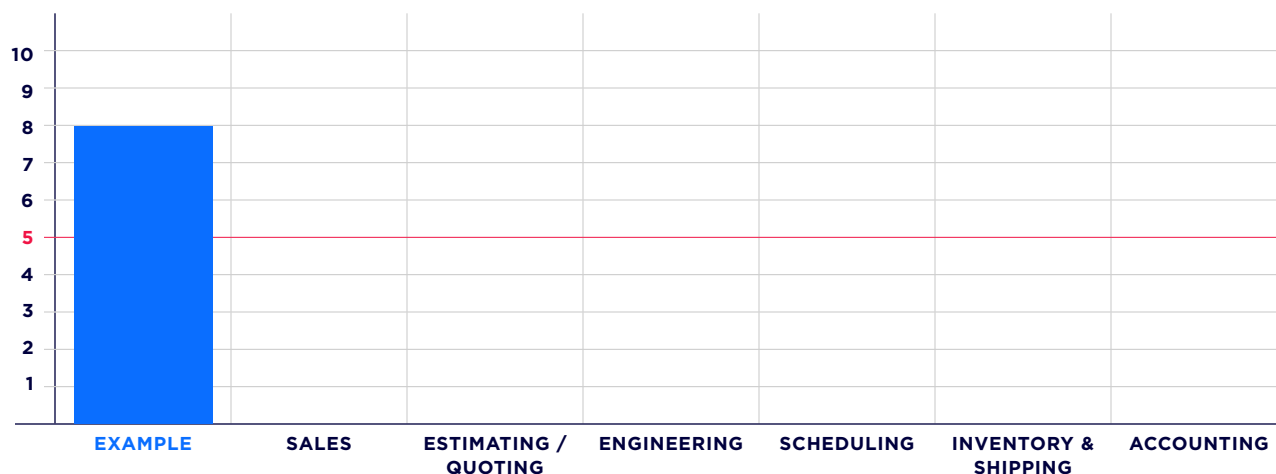
We need to improve _____ by doing _____

We need to improve _____ by doing _____

We need to improve _____ by doing _____

RATE EACH PART OF YOUR OPERATIONS

With a score of 5 as a baseline for what you consider satisfactory, please take a minute to identify which departments are performing well, and where improvements need to be made.





ERP SELECTION CHECKLIST

Go through the steps, one check at a time

STEP 1

FORM YOUR SELECTION PANEL

- ☐ Choose team members
- ☐ Kickoff meeting
- ☐ Set timeframes and guidelines for search
- ☐ Assign roles and responsibilities
- ☐ Determine voting process or authority levels

STEP 2

EVALUATE NEEDS

- ☐ Examine your business processes and needs in detail
- ☐ Be ruthless in your internal evaluation (this will pay off later!)
- ☐ Be specific in identifying your needs (this will help you fend off cookie-cutter ERPs that aren't built for you)
- ☐ Write needs out in actionable sentences
- ☐ Ballpark potential ROI

STEP 3

IDENTIFY AVAILABLE SOLUTIONS

- ☐ research ERPs for your industry
- ☐ Ask for referrals from companies similar to yours
- ☐ Hold the key features of selected ERPs up to your needs
- ☐ Make a shortlist (not too short, not too long)
- ☐ Start thinking about long-term goals

STEP 4

SCHEDULE CONSULTATIONS

- ☐ Prep your questions
- ☐ Schedule consultations back-to-back (or as close as possible)
- ☐ Grill each company
- ☐ Follow up with questions by email
- ☐ Get feedback from selection panel about each company

STEP 5

SHORTLIST, CHECK REFERENCES

- ☐ Trim list of ERPs down to 2-3
- ☐ Measure options up to cost
- ☐ Contact references (ERP company will provide)
- ☐ Double-check all questions have been answered
- ☐ Ask shortlisted companies about implementation
- ☐ Start considering implementation timeline