

ERP and CRM Evaluation Early Assessment Guide

Use this worksheet to help determine if your company can benefit from a new business management system

Choosing the best business management software solution for your company can play a critical role in your success. Before evaluating a solution to invest in, it is important to look at your critical business areas. And then you should ask yourself some questions to help determine your need for a business management system.

Overall business concerns include: Declining profitability, cash flow problems, poor employee productivity, and poor capability for strategic planning. What contributes to these problems in your business? If you answer “no” to questions like the ones listed below, you may want to take a closer look at business management solutions. Each “no” answer may help you uncover a valuable business opportunity that you can act on.

Business Issues	Yes	No	Target Date (High, Med, Low)
Financial management			
1. Are data-entry processes efficient and reliable, resulting in correctly recorded transactions? And is it easy to reconcile balances?			
2. Is it easy for employees to research financial records or generate reports, doing so in a brief timeframe?			
3. Are general ledger accounts in balance? And is it a minor task to resolve the odd discrepancy?			
4. Do month-end closings generally take little time and effort? And do invoices and payments happen quickly?			
Distribution			
1. Is your inventory data generally inaccurate, resulting in few, if any, out-of-stock situations?			
2. Does your current forecasting process result in the right levels of inventory for critical items—no shortages, no overages?			
3. Are shipping operations as dependable and flexible as needed? And are you satisfied with their cost-effectiveness?			
4. Are staffing levels in the warehouse or the shipping department at optimal levels? Can workers perform all tasks efficiently in the time they have, without working costly overtime hours? And are workers always productively busy, without slow times or times with nothing to do?			

Business Issues	Yes	No	Target Date (High, Med, Low)
Manufacturing			
1. Does your materials-planning process help you keep your overhead at an optimal, low level?			
2. Can you adjust your manufacturing process to satisfy customer requests for rapid changes in products?			
3. Are you operating continuously, without shutdowns caused by late arrival of materials or other factors?			
4. Does your quality assurance process consistently and efficiently succeed in ensuring optimal quality of both the products you make and the materials you receive from suppliers?			
Customer relationship management (CRM)			
1. Do you have a manageable, enforceable, consistent sales process with the capability to easily track lead conversion and sales results by product or by rep?			
2. Is the sales performance-to-quota at the level needed for the company to accomplish its revenue objectives?			
3. Is it easy for sales managers to identify new sales opportunities and act on them?			
4. Are sales forecasts based on dependable, current information about customer behavior and transaction histories? And do these forecasts connect to the manufacturing planning process?			

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