

FREE ASSESSMENT

PILLAR 1: STRATEGIC SYSTEMS | ERP READINESS TOOLKIT

THE ERP READINESS ASSESSMENT

Is Your Organization Ready for an ERP?

40 Questions • 8 Dimensions • Go / No-Go Recommendation

WHAT THIS ASSESSMENT DELIVERS

- 40 questions scored 1–5 across 8 readiness dimensions
- Each dimension weighted by ERP project success impact
- Five-band Go / No-Go recommendation with action guidance
- Gap-to-Action plan for your lowest-scoring dimensions

HOW TO SCORE EACH QUESTION

1 Not Exists	2 Ad Hoc	3 Developing	4 Established	5 Best Practice
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DECISION BANDS (Score out of 200)

180–200 STRONG GO	150–179 CONDITIONAL GO	120–149 PROCEED WITH CAUTION	80–119 NOT READY — REMEDIATE FIRST	40–79 STOP — FOUNDATIONAL WORK REQUIRED
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From the Author of

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Where Leadership Meets the Future

THE 40 QUESTIONS

Score each question 1–5. Circle or write your score in the box on the right.

A. Data Quality & Master Data Weight 15% • Max 15 pts

1 Customer, vendor, and item master data has been reviewed, cleansed, and deduplicated within the last 12 months.

2 A documented data governance policy defines data ownership, naming conventions, and quality standards.

3 Historical transaction data has been assessed for migration — volume, format, and cleansing requirements are understood.

4 Chart of accounts and financial dimensions are rationalized and agreed upon by Finance leadership.

5 Data entry processes have defined validation rules to prevent dirty data from entering source systems.

E. Executive Sponsorship Weight 13% • Max 13 pts

21 A named C-suite executive is serving as ERP project sponsor with decision-making authority and budget control.

22 The executive sponsor attends steering committee meetings and resolves cross-functional issues within 48 hours.

23 The Board or ownership group has been briefed and has formally approved the ERP investment case.

24 The executive sponsor has personally communicated ERP strategic importance to all department heads.

25 Finance, Operations, IT, and Sales are all committed stakeholders at VP/Director level.

B. Process Maturity & Documentation Weight 15% • Max 15 pts

6 Core processes (order-to-cash, procure-to-pay, record-to-report) are documented with current-state process maps.

7 Process owners have been identified for each major business process and are involved in ERP planning.

8 Known process pain points have been catalogued and prioritized for improvement during the ERP project.

9 Your organization has defined desired future-state processes — not just plans to automate the current state.

10 Finance and operations have agreed on approval workflows, chart of accounts, and inter-company rules.

F. Team Bandwidth & Resources Weight 12% • Max 12 pts

26 A resource plan identifies which employees will be dedicated to the ERP project and at what time commitment.

27 Backfill strategies have been identified for key SMEs who will be pulled from operational responsibilities.

28 Project management capability has been confirmed and is explicitly funded in the project budget.

29 The implementation timeline has been assessed — no major conflicts exist in the proposed project window.

30 Department heads have signed off on resource commitments as a performance expectation.

C. Change Management Capacity Weight 12% • Max 12 pts

11 A dedicated change management lead has been identified and budgeted for the ERP project.

12 Leadership has communicated a clear, consistent message about why the ERP is being implemented.

13 The organization has experience managing large-scale technology change with documented outcomes.

14 A training strategy and resource plan has been developed for end-user and admin training.

15 A super-user / ERP champion network has been planned to support adoption post go-live.

G. Vendor Evaluation Criteria Weight 10% • Max 10 pts

31 A formal RFP process has been completed or is planned, with scoring criteria agreed before vendor demos.

32 Reference checks with ERP vendors' SMB customers in your industry are completed or scheduled.

33 Total cost of ownership (TCO) over 5 years has been modeled for each shortlisted vendor.

34 Contract terms including SLAs, data ownership, exit provisions, and price escalation caps have been reviewed.

35 A proof-of-concept or sandbox evaluation has been conducted with at least the top two vendors.

D. Technical Infrastructure Weight 10% • Max 10 pts

16 Network bandwidth and latency are sufficient to support cloud or client-server ERP performance at all locations.

17 Hardware inventory has been reviewed against ERP minimum specifications for all user locations.

18 A cybersecurity and access policy framework can govern ERP user roles, permissions, and audit trails.

19 IT disaster recovery and business continuity plans cover ERP systems with defined RTO/RPO targets.

20 Integration infrastructure (middleware, APIs, EDI) has been assessed for ERP compatibility.

H. Integration Complexity Weight 13% • Max 13 pts

36 A complete inventory of all systems integrating with the ERP (CRM, WMS, payroll, banking) is documented.

37 Data flows between systems have been mapped — what data moves, at what frequency, and in what format.

38 Each integration has been assessed for complexity: standard connector, API required, or custom build needed.

39 An integration ownership model defines who is accountable for each integration in production.

40 Integration testing strategy and environments have been planned and included in the project budget.

SCORING SUMMARY & GO / NO-GO DECISION

Transfer your 5 question scores per dimension. Multiply raw score by weight multiplier.

Dimension	Wt	Q1	Q2	Q3	Q4	Q5	Raw /25	Multiplier	Weighted Score	Notes
A Data Quality & Master Data	15%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.60	___ / 15	
B Process Maturity & Documentation	15%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.60	___ / 15	
C Change Management Capacity	13%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.48	___ / 12	
D Technical Infrastructure	10%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.40	___ / 10	
E Executive Sponsorship	13%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.52	___ / 13	
F Team Bandwidth & Resources	10%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.48	___ / 12	
G Vendor Evaluation Criteria	10%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.40	___ / 10	
H Integration Complexity	13%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	___ / 25	x 0.52	___ / 13	
TOTAL READINESS SCORE							Sum all 8 weighted scores →	___ / 200		

YOUR GO / NO-GO RECOMMENDATION

180–200	STRONG GO Organization is well-prepared. Proceed to vendor selection and contract negotiation.
150–179	CONDITIONAL GO Broadly ready with specific gaps. Build a gap closure plan and proceed with vendor selection.
120–149	PROCEED WITH CAUTION Material gaps exist. Address lowest-scoring dimensions before signing any contracts.
80–119	NOT READY — REMEDIATE FIRST Significant gaps will put the project at high risk of failure and cost overrun.
40–79	STOP — FOUNDATIONAL WORK REQUIRED The organization lacks foundational capabilities. Proceeding now will waste capital.

GAP-TO-ACTION PLAN — Your 3 Lowest-Scoring Dimensions

#1 Dimension: _____	Score: ___ / 25	Action: _____	Owner: _____
#2 Dimension: _____	Score: ___ / 25	Action: _____	Owner: _____
#3 Dimension: _____	Score: ___ / 25	Action: _____	Owner: _____

Completed by: _____ Date: _____ Total Score: ___ / 200 Decision: _____
 Share with your ERP project sponsor and system integrator before signing any contracts.

Access the ERP TCO Model, Vendor Scorecard & Project Charter at [EfuturesCFO.com](https://efuturescfo.com)