



THE SYSTEM CFO SERIES
HINDOL DATTA

FREE ASSESSMENT

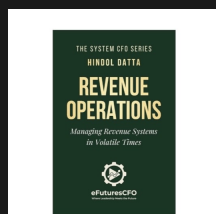
PILLAR 1: STRATEGIC SYSTEMS | TOOLKIT #2 OF 37

THE ERP NERVOUS SYSTEM AUDIT

*Assessing If Your Tech Stack Enables or Hinders
Decision Speed Across the Enterprise*

20-Question Diagnostic | 5-Page Assessment

Score Your Organization 1-5 Across Four Dimensions
Identify Gaps and Build Your Action Plan



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Where Leadership Meets the Future

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QUESTIONS 1-5

Section A: System Architecture and Integration

Is Your ERP the Spine of a Connected Nervous System — or an Isolated Organ?

The ERP is not just accounting software. It is the central nervous system of the enterprise — the system through which financial signals travel to inform decisions. When the ERP is disconnected from CRM, HRIS, billing, and operations systems, the CFO is making decisions on delayed, incomplete, or manually assembled data. This section assesses whether your technology architecture functions as an integrated system or a collection of islands.

A. SYSTEM ARCHITECTURE AND INTEGRATION

1	The ERP system serves as the single source of truth for all financial data — no shadow systems, side spreadsheets, or parallel databases are used for financial reporting.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
2	CRM data (pipeline, bookings, customer records) flows automatically into the ERP without manual re-entry, enabling real-time revenue visibility from opportunity to recognition.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
3	HRIS and payroll data integrates with the ERP so that headcount, compensation, and benefits expenses are reflected in financial reporting without manual journal entries.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
4	The billing and invoicing system is integrated with the ERP, ensuring that revenue recognition, deferred revenue, and AR are updated automatically upon invoice generation.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
5	Operational systems (inventory, manufacturing, project management, time tracking) feed the ERP with actual cost data, enabling real-time margin analysis without month-end	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION A SCORE: Total: ____ / 25 Average: ____ / 5



QUESTIONS 6-10

Section B: Data Quality and Decision Speed

How Fast Does Accurate Financial Data Reach Decision-Makers?

The value of an ERP is not the data it stores but the speed at which accurate data reaches the people who need it to make decisions. A system that produces perfect data three weeks after month-end is less valuable than one that produces 95% accurate data in real time. This section measures the velocity and quality of your financial data flow.

B. DATA QUALITY AND DECISION SPEED

6	Financial data in the ERP is accurate enough to make operating decisions in real time — managers do not need to wait for month-end close to understand their financial position.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
7	The chart of accounts is structured to support both management reporting and statutory reporting without requiring manual reclassification or mapping at period end.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
8	Real-time dashboards and reports are generated directly from the ERP or its integrated BI layer, not from exported data that is manually manipulated in spreadsheets.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
9	The time from transaction entry to availability in financial reports is less than 24 hours for all material transaction types (revenue, expenses, cash, payroll).	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
10	Data quality controls (validation rules, required fields, approval workflows) are enforced at the point of entry in the ERP, preventing bad data from entering the system.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION B SCORE: Total: ____ / 25 Average: ____ / 5

QUESTIONS 11-15

Section C: Automation and Scalability

Can Your ERP Handle the Next Phase of Growth Without Breaking?

An ERP that works at \$20M in revenue may collapse at \$100M. Manual processes that are tolerable with 50 transactions per day become impossible at 500. The System CFO evaluates not just whether the ERP works today, but whether it can absorb the next 3-5 years of growth without requiring a replacement or major re-implementation.

C. AUTOMATION AND SCALABILITY

11	Recurring journal entries, accruals, allocations, and intercompany eliminations are automated within the ERP — not prepared manually in spreadsheets and then uploaded.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
12	The monthly close process is supported by automated workflows within the ERP (task assignment, completion tracking, sign-off) rather than managed via email or shared documents.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
13	The ERP can support multi-entity, multi-currency, and multi-geography operations without requiring separate instances, manual consolidation, or offline translation.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
14	The current ERP can absorb a doubling of transaction volume (revenue, invoices, POs, journal entries) without performance degradation or requiring a system replacement.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
15	User adoption is high — more than 80% of the functionality purchased is actively used, and the finance team is not working around the system with manual workarounds.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION C SCORE: Total: ____ / 25 Average: ____ / 5

QUESTIONS 16-20

Section D: Security, Controls, and Future-Readiness

Is Your ERP Protected, Auditable, and Ready for AI?

The ERP is both the most valuable and most vulnerable system in finance. Access controls protect against fraud. Audit trails enable compliance. And increasingly, the ERP must serve as the data foundation for AI and machine learning applications. A system that cannot support these requirements is a liability, not an asset.

D. SECURITY, CONTROLS, AND FUTURE-READINESS

16	Role-based access controls are implemented in the ERP with segregation of duties enforced — no single user can initiate, approve, and post a financial transaction.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
17	A complete audit trail exists for all financial transactions in the ERP — every entry, modification, and deletion is logged with user, timestamp, and reason for change.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
18	The ERP undergoes regular security assessments, and all patches and updates are applied within 30 days of release to protect against known vulnerabilities.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
19	The ERP's data architecture (clean, structured, complete) is sufficient to support AI and machine learning applications such as anomaly detection, forecasting, and process	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
20	There is a documented ERP roadmap — a plan for the next 3 years that addresses known limitations, planned upgrades, integration improvements, and alignment with business	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION D SCORE: Total: ____ / 25 Average: ____ / 5

OVERALL ASSESSMENT SCORE
 Section A: ____ / 25 Section B: ____ / 25 Section C: ____ / 25 Section D: ____ / 25 TOTAL: ____ / 100 AVG: ____ / 5



GAP TO GOAL

Gap-to-Goal Action Plan

Bridging the Gap — ERP Nervous System Audit

Transfer your five lowest-scoring questions. For each gap, define the target state, specific actions, owner, timeline, and success metric. Focus on highest-impact gaps first.

GAP #	Q REF	CURRENT	TARGET	SPECIFIC ACTION TO CLOSE GAP	OWNER	DEADLINE	METRIC
1	Q__	___/5	___/5	_____	_____	_____	_____
2	Q__	___/5	___/5	_____	_____	_____	_____
3	Q__	___/5	___/5	_____	_____	_____	_____
4	Q__	___/5	___/5	_____	_____	_____	_____
5	Q__	___/5	___/5	_____	_____	_____	_____

ASSESSMENT SUMMARY

Completed by: _____ Date: _____

Overall average score: ___ / 5 Items scored 1-2 (critical): ___

Items scored 3 (developing): ___ Items scored 4-5 (strong): ___

Top strength: _____

Most critical gap: _____

One action this week: _____

READY TO GO DEEPER?

This free assessment identified your gaps. The Premium System CFO Toolkits provide the frameworks, templates, and action plans to close them. Visit EfuturesCFO.com





READY TO GO DEEPER?

This Assessment Identified the Gaps. The Premium Toolkit Closes Them.

PREMIUM: The ERP Nervous System Audit (12 Pages)

The full premium toolkit includes the complete ERP health diagnostic with nerve pathway mapping, integration architecture assessment, data flow velocity analysis, automation maturity scoring, scalability stress-test framework, security and controls deep dive, AI-readiness evaluation, and a 90-day ERP improvement roadmap with executive scorecard.

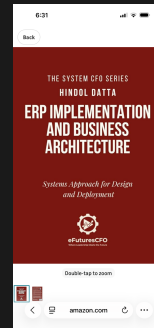
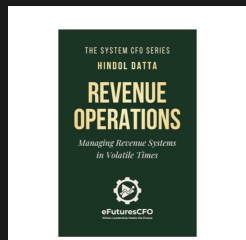
Plus. Access the Super Exclusive 40-Page System CFO Organizational Finance Assessment Kit

ABOUT THE AUTHOR

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