



THE SYSTEM CFO SERIES  
HINDOL DATTA

FREE ASSESSMENT

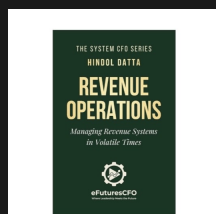
PILLAR 3: TACTICAL OPERATIONS | TOOLKIT #17 OF 37

# THE ERP EVALUATION READINESS SCORECARD

*Knowing What You Need Before  
the Vendors Tell You What to Buy*

20-Question Diagnostic | 5-Page Assessment

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



EfuturesCFO.com

Where Leadership Meets the Future

(C) 2026 Hindol Datta. All Rights Reserved.

**QUESTIONS 1-5**

# Section A: Current State Pain Points and Requirements

*Do You Know Why You Need a New ERP — or Just That the Current One Hurts?*

*Most ERP evaluations begin with vendor demos rather than requirements definition. The result is predictable: organizations select systems based on impressive presentations rather than actual fit. The System CFO insists on rigorous current-state documentation before a single vendor is contacted — mapping every pain point, every workaround, every manual process, and every integration gap that the new system must resolve.*

**A. CURRENT STATE PAIN POINTS AND REQUIREMENTS**

1	Current ERP pain points are documented comprehensively — every workaround, manual process, system limitation, and integration gap has been catalogued with the business impact quantified in	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
2	Requirements are defined by business process, not by feature list — the organization has mapped its end-to-end processes (order-to-cash, procure-to-pay, record-to-report, hire-to-	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
3	Must-have vs. nice-to-have requirements are clearly distinguished — a weighted scoring matrix separates critical requirements (deal-breakers) from desirable features	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
4	Future-state requirements are included — the evaluation considers not just today's needs but projected needs over 3-5 years including new entities, geographies, currencies.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
5	Cross-functional stakeholders have contributed requirements — finance, operations, sales, HR, and IT have all provided input, and conflicting requirements have been resolved through	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

**SECTION A SCORE: Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5**



QUESTIONS 6-10

## Section B: Vendor Evaluation and Selection Process

Are You Evaluating Vendors Rigorously — or Being Sold?

ERP vendors are sophisticated sales organizations. Their demos are designed to impress, not to reveal limitations. The System CFO builds an evaluation process that tests vendors against real scenarios, checks references from similar companies, validates implementation timelines and costs, and ensures that the selection decision is based on evidence rather than persuasion.

### B. VENDOR EVALUATION AND SELECTION PROCESS

6	A structured RFP has been issued — with specific scenarios, use cases, and data requirements that force vendors to demonstrate capabilities against your actual business	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
7	Vendor demos use your data and your scenarios — not the vendor's pre-built demo environment, but your chart of accounts, your transaction types, your reporting requirements.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
8	Reference checks include companies of similar size, industry, and complexity — and reference conversations include questions about implementation challenges, ongoing costs, and post-go-	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
9	Total cost of ownership (TCO) is evaluated over 5 years — including license or subscription fees, implementation costs, customization, integration, training, ongoing support, and	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
10	An evaluation committee with cross-functional representation scores vendors using the weighted requirements matrix — with documented scores, consensus discussion, and rationale for the	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION B SCORE: Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5

## QUESTIONS 11-15

## Section C: Implementation Planning and Risk Management

*Do You Have a Realistic Implementation Plan — or a Vendor's Optimistic Timeline?*

*ERP implementations are notorious for running over budget and over schedule. The median ERP project exceeds its original timeline by 50% and its budget by 30%. The System CFO builds a realistic implementation plan that accounts for data migration complexity, change management resistance, testing thoroughness, and the inevitable scope changes — rather than accepting the vendor's best-case timeline as the plan.*

### C. IMPLEMENTATION PLANNING AND RISK MANAGEMENT

11	A detailed implementation plan exists — with phased milestones, resource requirements (internal and external), dependencies, risk factors, and contingency time built into	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
12	Data migration complexity has been assessed — the organization has inventoried all data to be migrated, evaluated data quality, defined cleansing requirements, and planned for	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
13	A change management plan addresses people impact — including training programs, communication plans, stakeholder engagement, resistance management, and post-go-live support	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
14	Testing strategy includes unit testing, integration testing, user acceptance testing, and parallel processing — with defined pass/fail criteria and a go/no-go decision framework	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
15	Implementation risks are identified and managed — the top 10 risks to the project (budget, timeline, quality, adoption) are documented with probability, impact, mitigation strategies,	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

**SECTION C SCORE: Total: \_\_\_\_\_ / 25      Average: \_\_\_\_\_ / 5**



**QUESTIONS 16-20**

## Section D: Governance, Budget Controls, and Success Metrics

*Who Owns the ERP Project — and How Will You Know If It Succeeded?*

*ERP projects fail most often from governance failures, not technology failures. Unclear decision rights, scope creep without budget adjustment, insufficient executive sponsorship, and undefined success metrics create the conditions for expensive disappointment. The System CFO establishes governance that treats the ERP implementation as the highest-risk capital project in the organization.*

**D. GOVERNANCE, BUDGET CONTROLS, AND SUCCESS METRICS**

16	An executive steering committee oversees the implementation — with defined meeting cadence, escalation authority, decision rights for scope changes, and accountability for project	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
17	Budget controls include a change order process — any scope addition that affects cost or timeline requires formal approval with documented business justification and impact	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
18	Success metrics are defined before implementation begins — specific, measurable outcomes (close time reduction, report accuracy, processing efficiency) that the new system must	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
19	A post-implementation review is planned — at 3, 6, and 12 months after go-live, actual results will be compared against the original business case and success metrics.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
20	The organization has allocated sufficient internal resources — key finance team members are dedicated to the project (not splitting time with their regular duties) during critical	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 Evaluation Readiness Scorecard*

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](http://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 nerve pathway mapping framework, integration architecture assessment, system velocity analysis, data quality scoring methodology, scalability stress-test protocols, AI-readiness evaluation, and the comprehensive

ERP roadmap planning template.

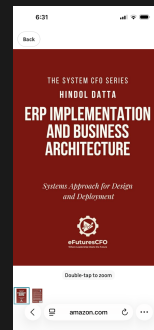
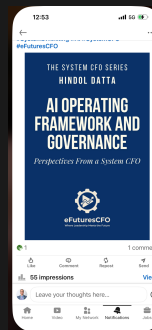
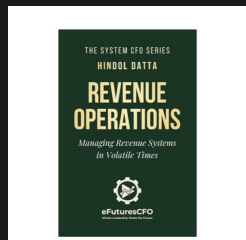
*Plus. Access the Super Exclusive 46-Page  
System CFO Organizational Finance Assessment Kit*

### ABOUT THE AUTHOR

## Hindol Datta

25+ years as CFO and VP Finance | \$150M+ in M&A | CPA, CMA, CIA, PMP, CPIM

Author of The System CFO Series | MS Analytics, Georgia Tech



**EfutureCFO.com**

LinkedIn: Hindol Datta | YouTube: @efuturescfo

*Where Leadership Meets the Future*