ERP Health Report Card
-Self Assessment

Instructions: Use this calculator to spot hidden inefficiencies that cost time, money and opportunities. Rate how true each statement is for your organization on a scale of 1 to 5, then total your score at the end:

1 = Not true at all, 2 = Slightly true, 3 = Somewhat true, 4 = Mostly true, 5 = Very true

1. We rely on spreadsheets or manual workarounds to complete everyday tasks.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

2. It's difficult to get real-time visibility into financials, project status, or KPI's.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

3. Our ERP feels outdated and lacks modern features like mobile access and real-time dashboards.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

4. Our teams use multiple disconnected systems that don't integrate well with one another.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

5. We've experienced delays, errors, or rework due to inaccurate or duplicate data.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

6. Our ERP is difficult or expensive to customize, update, or maintain.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

7. Business growth (e.g., new employees, new offices, service lines) is straining our system's capacity.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

8. Reporting and analytics are slow, incomplete, or require IT involvement.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

9. Team members find our system unintuitive or difficult to learn and navigate.

   1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

10. Leadership lacks confidence that we're making fully informed, data based decisions.

    1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Your ERP Assessment Report:

☐ **Total Score**

Total Score	ERP Health
10-20	**You're in the Clear!** Your ERP s likely still aligned with your needs. Continue to monitor performance and user feedback annually.
21-35	**Needs Improvement.** You're likely facing growth inefficiencies. It's time to evaluate ERP gaps and consider modernization within the next 6-12 months.
36-50	**Time to Modernize!** Your ERP is holding you back. Now is the time to explore modern solutions that can support data-driven growth, integration, and scalability.

Is Your Current System Holding Your Firm Back? We Can Help!

Scan or Click the QR Code to Contact Us!

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