

ERP Evaluation Checklist

Use this checklist to determine whether your ERP system is performing at its best and delivering the ROI you expect.

1. System Performance & Reliability

- System speed meets business needs
- Minimal downtime or disruptions
- Updates are applied consistently
- No recurring performance issues

2. Process Efficiency

- Key workflows are fully supported by the ERP
- Minimal manual workarounds
- No duplicate data entry
- Automation is used where possible
- Employees are not relying heavily on spreadsheets

3. User Adoption & Training

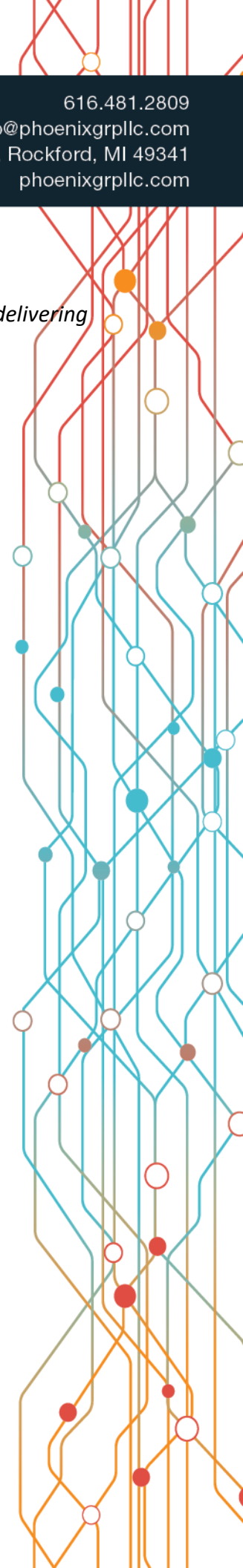
- Employees understand how to use the system
- Training has been provided within the last 12–18 months
- New features/modules have been introduced to users
- Adoption rates are high across departments
- Support is available for questions or challenges

4. Features & Functionality

- You're using the modules you're paying for
- Features align with current business needs
- You're aware of new features or updates released by the vendor
- No unused or underutilized functionality

5. Reporting & Data Quality

- Reports are easy to generate
- Data is accurate and consistent
- Dashboards provide meaningful insights



- No reliance on external tools for basic reporting
- Data security and access controls are up to date

6. Integrations

- ERP connects smoothly with other internal systems
- No delays or breakdowns in data sharing
- No manual exporting/importing data between platforms
- Integrations support end-to-end workflows

7. Cost vs. Value

- Total cost of ownership is clear and predictable
- Licensing matches actual usage
- You're not paying for unused features
- Measurable value is being produced by the system
- Costs align with the system's performance

8. Future Readiness

- ERP can support your projected growth
- System is compatible with evolving tech demands
- Scalability options are available
- Vendor support meets your expectations

Your Score

- **30–40 checks:** Your ERP is performing well
- **20–29 checks:** Some improvements or optimizations recommended
- **0–19 checks:** A deeper evaluation is strongly encouraged

Need Help Interpreting Your Results?

We'd be happy to walk through them with you and help identify high-value improvement opportunities. Schedule your [complimentary meeting](#) today with The Phoenix Group.

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