



Do You Need An ERP? - Self-Assessment for General Business (Financials)

Enter the point value in the "Score" column based on how you would rate your organization's assessment for each category.

Category	Description of Current Business System(s)	Points	Score
Overall Technology	Fragmented Systems. Poor Data	4	
	Multiple Tools and Technologies. Internally Managed	3	
	Single Data Model. Customized Frameworks. Optimized for Scale	2	
	Multi-Tenant Real-Time. Automatic Updates. Embedded Intelligence	1	
Financials	Basic Receivables, Payables & Month Reporting w/ Limited Integrations	4	
	Fully Integrated AR, AP, GL with other transactional integration. SQL Reports.	3	
	Multi-Company Management, Consolidation, Budgeting, Multi-Currency	2	
	Multi-Company Management, Consolidated Audit, Real-time, Approval Routing	1	
Selling & Order Management	Place an order through CRM tool	4	
	Integrate CRM with provisioning system and accounting system	3	
	View inventory, support, billing, collections status for order fulfillment	2	
	One 360-degree view, reporting, automation, full visibility across process	1	
Billing & Invoicing	Manual in Excel	4	
	Online customer portal to receive and pay invoices	3	
	Automated billing	2	
	Line item level billing, revenue schedules, usage-based billing	1	
Procurement & Expense Management	Manual, spreadsheet driven, disparate systems, time consuming	4	
	Real time streamlined process, purchase and payable activity with increased spend control and visibility	3	
	Workflow and exception notification pricing models, purchase contracts, integrated asset life cycle management	2	
	Global vendor scorecards, onboarding and supplier collaboration	1	

Total Score:

Scoring Tiers and Recommended Actions

0-5 Total Score: No Modernization needed.

6-10 Total Score: A productive conversation is warranted before a modernization recommendation is made.

10-20 Total Score: A modernization is likely needed. Let's put an evaluation plan in place.

See how you compare against your competitors return your results to: results@govirtualoffice.com

Need Help with Your ERP Evaluation? Contact Us Today!



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