

Do You Need An ERP? - Self-Assessment for Services Industry

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	
Sales	Basic contact information	4	
	Integrate CRM with provisioning system and accounting system. Quoting tools not integrated with financials	3	
	View inventory, support, billing, collections status for order fulfillment	2	
	One 360-degree view, reporting, automation, full visibility across process	1	
Project Management & Delivery	Manual or spreadsheet project management with little visibility into project metrics	4	
	Basic task tracking & project management in disparate systems	3	
	More robust project management workflows and templates. Separate systems to manage project financials	2	
	Integrated project management, project accounting, time tracking & resource management with built-in forecasting & analytics	1	
Resourcing	Ad-hoc, Last Minute, "Horse-trading"	4	
	Staffing from spreadsheets and whiteboards, skills inventory not documented	3	
	Systems in place for scheduling and skills inventory, Disconnected from project management and project accounting systems	2	
	Integrated resource, project management and project accounting systems with built-in forecasting & analytics. Request process with approvals	1	
Delivery	Manual, spreadsheet-driven, disparate systems	4	
	Basic time tracking & project management in disparate systems	3	
	Automated project management and project accounting	2	
	Integrated project management, project accounting, time tracking & resource management with built-in forecasting & analytics	1	

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Category	Description of Current Business System(s)	Points	Score
Revenue Management	Doesn't happen	4	
	Revenue recognition tracked in a spreadsheet with basic reporting	3	
	Automate handling of multi-element arrangements	2	
	Integrated system to handle today & tomorrow's revenue recognition standards, including ASC 606 compliance, dynamic fair value allocation & linked orders	1	
Project Accounting	Manual in Excel, separate from core financial system	4	
	Separate systems with some automated imports to financial system	3	
	Automated contract accounting, integrated billing, streamlined approvals and workflows	2	
	Billing schedules, flexible invoice format, and project details native to the ERP platform. Hybrid billing rules for both invoicing and forecasting	1	
Orders	Information limited to quantity and price	4	
	Accept orders from multiple sources (EDI, phone, fax, web)	3	
	Landed cost tracking, workflows, pricing models	2	
	360-degree view, reporting, automation manage by exception	1	
Sourcing	Manual, spreadsheet-centric, time consuming	4	
	Demand planning, consolidated views, multiple locations	3	
	Messaging, Exception lagging, PO tracking, consolidated procurement, negotiated pricing benefits	2	
	Vendor portals, supplier collaboration, buyers' scorecards, contracts	1	
Warehouse	Paper-based workflows, operator driven, basic inventory tracking	4	
	RF/Mobile barcode scanning, manual replenishment and cycle counting	3	
	Inventory allocation by FIFO/FEFO, dynamic putaway, integrated ASN	2	
	Wave planning, cartonization, labor, planning, dynamic slotting	1	
Support	Manual issue tracking, customer data in silos	4	
	Non-collaborative, 1:1 issue tracking	3	
	Central customer data repository, team collaboration	2	
	Complete customer view, customer portal, workflow, automation, infrastructure	1	
Total Score:			

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Scoring Tiers and Recommended Actions

0-12 Total Score: No Modernization needed.

12-24 Total Score: A productive conversation is warranted before a modernization recommendation is made.

24-48 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

Next Steps

(Follow the links below)

- [Understand the Business Value, Benefits and ROI of a Modern ERP System](#) - Includes value (ROI) calculator.
 - Direct Link: <https://goVirtualOffice.com/ERP-ROI>
- [Selecting an ERP - Best Practices](#) - Includes business process maps, vendor scorecard, sample RFI and top 10 questions to ask your ERP vendor.
 - Direct Link: <https://goVirtualOffice.com/ERP-SELECTION>
- [Why NetSuite](#) - #1 Cloud ERP.
 - Direct Link: <https://goVirtualOffice.com/WHY-NETSUITE>
- [Why goVirtualOffice](#) - Our team of former CFOs, CPAs, controllers, business leaders and technology experts will bring you real world experience and best practices that will ensure you have long-term success and a high ROI with your ERP, accounting and technology solutions.
 - Direct Link: <https://goVirtualOffice.com/WHY-US>

Need Help With Your ERP Evaluation? Contact Us Today!

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