

Checklist: 10 Questions for Choosing an ERP System

A methodical process can ensure you've planned for success. Use this checklist as a guide for mapping your ERP selection process.

Select **YES** or **NO** to the following:

	YES	NO
<p>Have you established clear goals? Documenting measurable and achievable goals for replacing your ERP greatly streamlines decision-making and justifies the investment to company stakeholders.</p>		
<p>Have you established your “why” for changing ERP? Establishing clear reasoning for why this change is important aligns with setting goals for this project and provides a north star for your team to engage in this project.</p>		
<p>Have you visualized the future state of the business? Knowing the business’ short- and long-term goals is critical to factoring how your ERP system will enable your organization to reach your desired future state.</p>		
<p>Have you established an executive sponsor? Make sure your CEO, CFO, COO, and/or CIO/CTO supports this project and can anticipate and remove obstacles to keep the process moving.</p>		
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<p>Have you identified and outlined your system requirements? Working with a business analyst to assess and document your requirements can greatly ensure a successful choice to reaching your business’ goals.</p>		
<p>Have you researched and evaluated potential solutions? Early research and evaluation can be completed by specific selection team members to narrow the list based on fit and alignment to strategy and goals.</p>		
<p>Have you developed a short list of solutions? When narrowing down to your short list of solutions to review, consider things like strategic alignment, product roadmap, and product release schedule.</p>		
<p>Have you performed due diligence? Make sure you thoroughly check items like support and training options, legal and contract concerns, pending sales or mergers, financial stability, and client references.</p>		
<p>Have you made a final recommendation? If you’ve followed the steps above, had clear communications throughout the process, and are grounded in your corporate strategy, a clear winner will emerge.</p>		

What have you discovered?

Need help in determining your requirements for ERP selection? Our team can provide business analysis services, discovery conversations, and software and solution demos to guide you through the process of determining if Microsoft Dynamics is the right ERP for your business. [Contact us today.](#)