



Do You Need An ERP? - Self-Assessment for CPA Firms

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
Work-In-Process & Revenue Management	Doesn't happen	4	
	WIP & Revenue recognition tracked in a spreadsheet with basic reporting	3	
	Semi automate handling of WIP & Revenue Recognition.	2	
	Integrated system to automatically handle WIP & Revenue recognition.	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	
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.

Need Help With Your ERP Evaluation? Contact Us Today!