

ERP Modernization Discovery Checklist

Is your business ready for the future?

Use this checklist to uncover hidden inefficiencies, align stakeholders, and set the foundation for a successful ERP modernization journey with HSO.

By thoughtfully exploring these questions, you'll gain clarity on your current state, business priorities, and the roadmap needed to transform your operations and drive innovation.

1. What's holding you back?

- ☐ Are outdated systems limiting visibility, agility, or decision-making?
- ☐ Are manual processes causing errors, delays or compliance risks?
- ☐ Is IT spending more time maintaining legacy systems than driving innovation?
- ☐ What key business/operational challenges would ERP modernization solve?
- ☐ Are you missing opportunities due to slow or fragmented operations?
- ☐ What would be the long-term impact if you don't modernize now?

2. Are You Aligned on the Why?

- ☐ What business goals are you trying to achieve?
- ☐ How do you define success? – and who owns that vision?
- ☐ Is this initiative being led by business, IT, or both?
- ☐ Who is the executive sponsor? How is their role defined?

3. Do You Understand Your Landscape?

- ☐ How complex is your organization (e.g. global presence, subsidiaries, M&A)?
- ☐ Are your business models and customer types consistent globally?
- ☐ Is the current application landscape centralized or fragmented?
- ☐ What is the structure between HQ and local subsidiaries? (centralized or decentralized)
- ☐ Are you able to scale easily with your current systems?

4. Are You Designing for the Future?

- ☐ What core processes are most critical to transform? (finance, supply chain, sales etc.)?
- ☐ What does your ideal end-state application look like?
- ☐ What are the most complex areas you anticipate in this rollout?
- ☐ Are there typically intercompany or multi-entity processes to consider?
- ☐ Do you have guiding principles (e.g. "standard only", harmonization) for the design and implementation?

Tip: Use this checklist as a starting point for internal alignment or with your ERP partner during discovery workshops.

Want to know more?



Book a discovery call now and let our experts guide you through your ERP modernization journey.

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