ERP Readiness Planner

Plan well.
Choose well.

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A short workbook to help your business plan its ERP upgrade journey.
Use this template to capture your current state, identify pain points, and plan next steps.

1.Current System Health Score

Before you plan an ERP upgrade, you need a clear and honest view of how your current system is performing.
This section helps you evaluate reliability, vendor support, stability and day to day performance. A structured health score makes it easier to spot early warning signs, highlight real risks and decide whether your existing system can support the business you want to be in the next few years.

Rate your current ERP or business system from 1 (Poor) to 5 (Excellent). Add notes where needed.

Category	Score (1–5)	Notes
System reliability		
User satisfaction		
Reporting & analytics		
Integration capability		
Vendor support		

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2. Key Pain Points

Capturing your organisation's pain points gives structure to the conversation about change. By identifying which tasks are slow, manual or error prone, you build a clear picture of what is holding your teams back.

This section helps you focus on the problems that matter most, so you can target improvements that deliver meaningful gains in productivity, accuracy and customer service.

List the main challenges you face with your current system.

Pain Point	Impact on Business

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3.Implementation Priorities

Clear priorities keep your ERP project focused and aligned with business goals. This section helps you define which areas should be addressed first, which can wait and which will deliver the highest impact.

When priorities are agreed and documented, it is much easier to plan a phased approach, manage expectations and avoid trying to fix everything at once.

What are your top goals for a new ERP system?

Priority	Why It Matters

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4.Budget and ROI Estimator

Planning your budget and understanding potential return on investment is essential for building a strong business case.

Use this section to estimate costs and capture the benefits of improved efficiency, reduced manual work, fewer errors and better visibility. This will help you assess payback periods, compare options and demonstrate the financial value of modernising your ERP system.

Estimate your potential investment and expected returns.

Item	Estimated cost (£)	Expected Benefit (£)	Payback Period Months
Software and Licences			
Implementation Services			
Training & Change Management			
Annual Maintenance and Hosting			
Vendor Support			

As you review the figures above, consider how they compare to everyday working practices:

• Where is time currently lost to manual or duplicated tasks?
• Which processes lead to delays, rework or avoidable errors?
• What improvements would release capacity or reduce pressure on teams?
• How would clearer visibility or reporting improve decision-making?
• When might these benefits realistically begin to outweigh the investment?

Use these prompts to sense-check your estimates and clarify the expected return on investment.

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5.Timeline Planning

A clear timeline helps everyone understand the journey from initial discovery through to go live.

This section allows you to map project stages, assign ownership and identify where internal resources will be needed.
A realistic timeline reduces disruption, supports better communication and gives your teams confidence that change is being managed in a structured and predictable way.

Outline your expected project stages and target completion dates.

Stage	Target Date	Responsible Owner
Discovery / Requirements		
Demonstrations		
Vendor Selection		
Implementation		
Testing and Training		
Go Live		

Tip: Use this workbook to align your leadership and project teams around clear priorities, realistic budgets, and achievable timelines before starting your ERP journey.
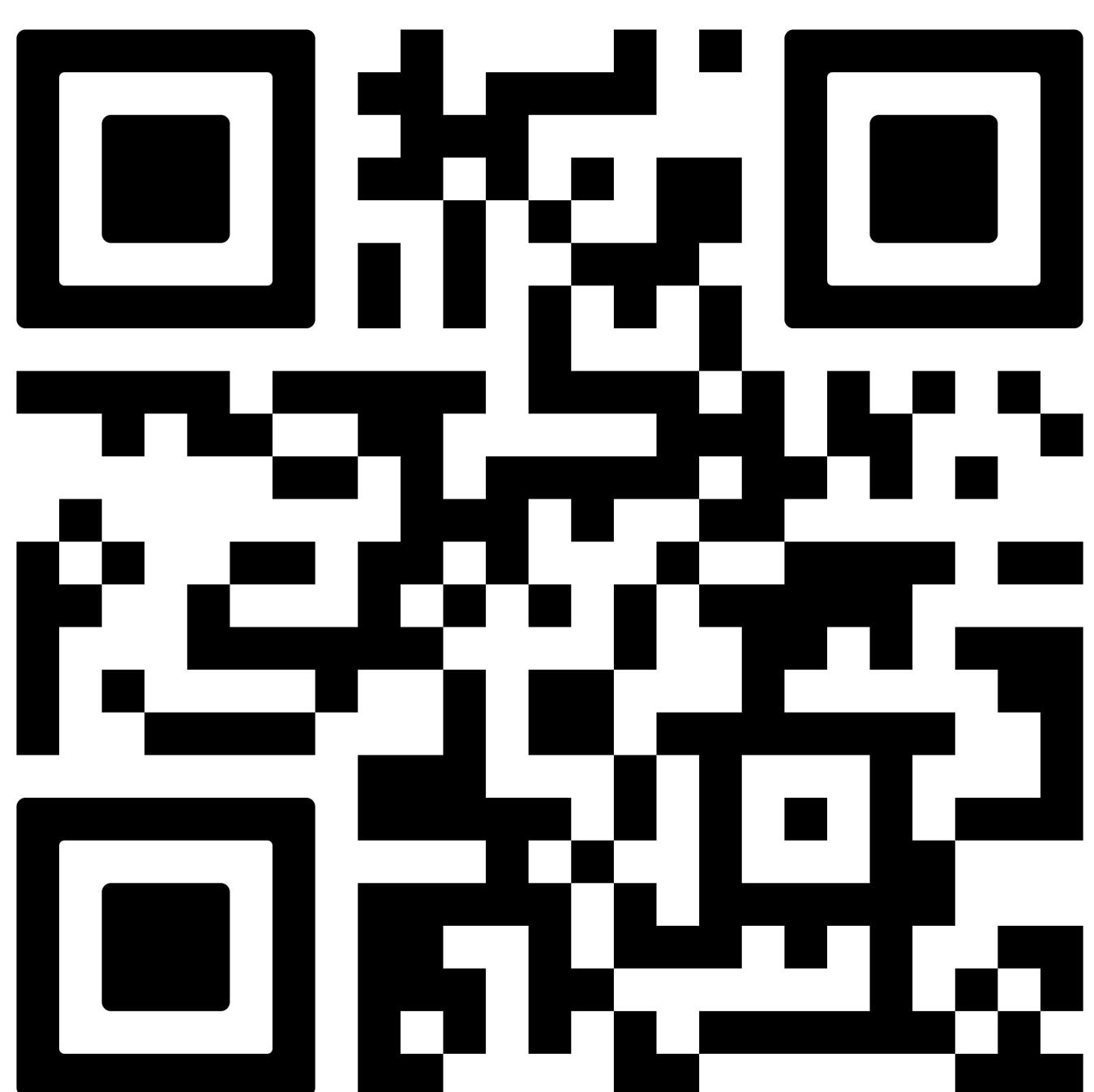
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Bringing it all Together

Completing this planner should give you greater clarity on your priorities, readiness and the potential value of an ERP investment. With a clearer understanding of your processes, costs and expected benefits, you are in a much stronger position to make informed decisions and avoid unnecessary risk later on.

If you would like to see how these requirements could work in practice, a tailored demonstration can help bring the detail to life. It is an opportunity to explore how an ERP system could support your specific processes, challenges and growth plans.

Book a demo to discuss your findings and see how they could translate into a practical ERP solution.

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