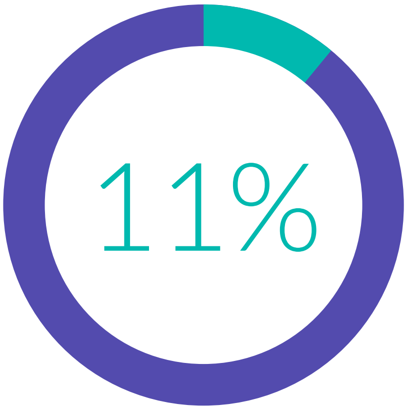
The ultimate ERP buying guide

How to choose software that powers growth and demonstrates ROI

OGL Software

Buyers Guide

Why invest in ERP?



An ERP system can reduce your inventory costs by 11%

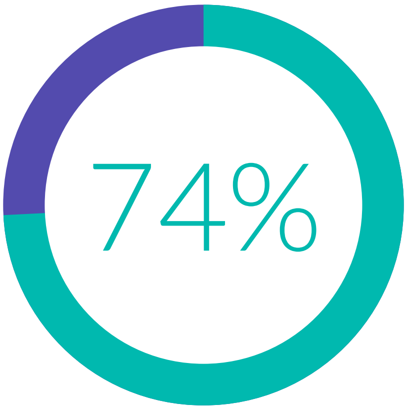
Investing in a new ERP system is an important business decision and one which you want to ensure will deliver tangible results.

At its simplest level, evaluating your ERP ROI (Return on Investment) can be worked out using a basic formula:

$$\text{ERP ROI} = \frac{\text{(Gains from ERP investment – Cost of ERP investment)}}{\text{Cost of ERP investment}}$$

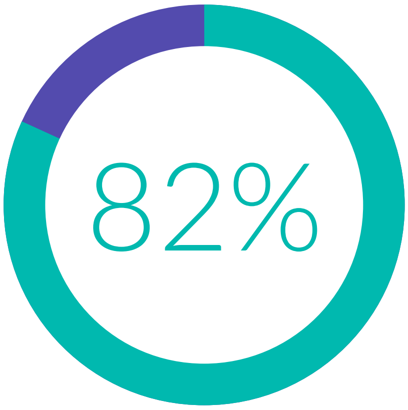
While this formula is a great place to start, it only gives you a partial picture. Getting an accurate idea of your ERP ROI goes beyond looking at monetary values or percentages. To get a complete picture of the value of your ERP investment, it's essential that you also consider the potential impact an ERP system can have across your entire business.

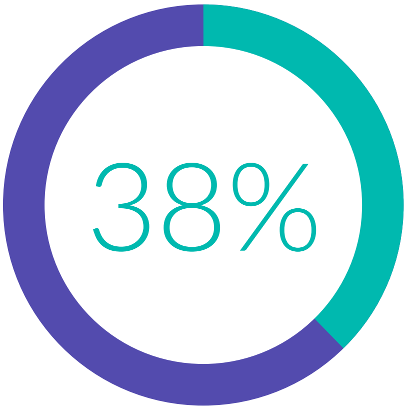
It's important that you consider ROI from all these different angles to understand just how much the right ERP can help your business. That's why we have put together this guide to help you examine how an ERP system can help you drive operational efficiency, increase profitability and improve customer service.



74% of stockist businesses see ERP as a way of gaining greater visibility and control of their stock

Sources: OGL Software ERP Survey, FounderJar, HubSpot





95% of businesses say ERP led to business process improvement / efficiencies

82% of stock businesses adopt ERP to automate processes to gain competitive advantage

38% say ERP enhances their ability to meet changing customer demands

Define your requirements

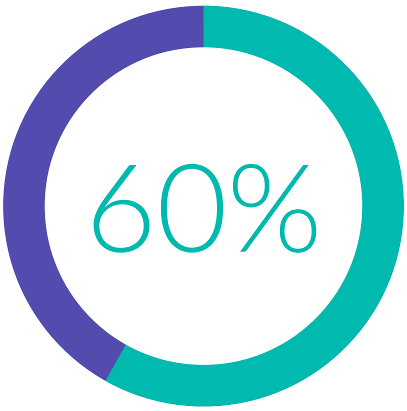
(before the demos)

Purchasing enterprise software is one of the most critical investment decisions your business will ever make. When done right, it's the engine for long-term growth; when done wrong, it leads to operational disruptions and wasted capital.

With over 60% of enterprise software projects failing to meet their original objectives, the stakes are high.

This guide provides a systematic evaluation process to help you avoid potential financial pitfalls and select a solution that truly fits.

The biggest mistake businesses make is letting a vendor's "flashy" features dictate their needs.



60% of enterprise software projects fail to meet their original objectives

Before engaging with sales teams, build a checklist across three pillars:

Functional requirements checklist

What specific processes must it support? (e.g., automated stock control, multi-currency accounting, or multi-warehouse management).

Focus on the specific operational tasks the software must perform daily.

Finance	Multi-currency support, automated invoicing, and real-time financial reporting (P&L, Balance Sheets).
Inventory	Real-time stock tracking, automated reorder points, and multi-location warehouse management.
Sales/CRM	Order tracking, integrated quotation-to-order workflows, and customer communication history.
Operations	Bill of materials (BOM) management, courier integration and quality control checkpoints.
Reporting	Customisable dashboards and the ability to "drill down" from high-level reports into individual transactions.

Technical requirements checklist

Does it meet your security standards? How does it handle data backups? Can it integrate with your existing CRM or eCommerce platforms via API?

Ensure the system is secure, reliable, and fits your current IT infrastructure.

Deployment	Decide between cloud-based (flexible access) or on-premise (complete data control) hosting.
Integration	Presence of Open APIs to connect with your website, eCommerce stores, or existing legacy tools.
Security	Role-based access controls, data encryption (at rest and in transit), and two-factor authentication (2FA).
Scalability	Ability to add new modules or increase user capacity without a drop in system performance.
Compliance	Support for industry-specific legislation, regulations and accreditations like GDPR, ISO 9001, EPR (Extended Producer Requirements) or MTD (Making Tax Digital).

Organisational requirements checklist

What is your realistic budget?
How many users need access?
What is your timeline for going live?

Assess the human and financial resources needed for a successful implementation.

Budget	A clear breakdown of total cost of ownership (TCO), including licensing, implementation fees, and a 10–20% contingency fund.
Timeline	Realistic milestones for data migration, testing, and "go-live", typically spanning 6 to 12 months.
Training	A defined strategy for user enablement, including on-site workshops and self-paced learning resources.
Support	Guaranteed Service Level Agreements (SLAs) for response times and access to UK-based technical help.
Leadership	Identification of a senior sponsor and project manager and a cross-functional internal team to lead the change.

The power of the "Single-Vendor" solution

One of your first crossroads will be choosing between a **Single-Vendor** integrated solution (like an all-in-one ERP) or a **Multi-Vendor** "best-of-breed" approach.

This "crossroads" is often where the hidden costs of an ERP project are decided. To make the right choice for your business, you need to look past the initial software features and consider the long-term operational impact.

The "Best-of-Breed" trap: Why multi-vendor often fails

On paper, picking the "best" CRM, the "best" warehouse tool, and the "best" accounting suite seems logical. However, this creates a fragmented ecosystem that introduces three major risks:

1

"Integration Hell"

Every time one vendor updates their software, the "bridge" (API) to your other systems might break. You become responsible for a never-ending cycle of technical maintenance and troubleshooting.

2

The Support Merry-Go-Round

When an order doesn't sync from your website to your accounts, the web vendor will blame the API, and the accounts vendor will blame the data format. You are left caught in the middle with a broken process and no clear solution.

3

The "Data Silo" Effect

When data lives in different databases, you lose a "single version of the truth." Your sales team sees one stock level, while the warehouse sees another. This leads to expensive manual data entry and human error.

Feature	Single-Vendor (Integrated ERP)	Multi-Vendor (Best-of-Breed)
Data Flow	**Seamless.** Information flows instantly between departments (e.g., Sales to Warehouse).	**Delayed.** Data often requires manual syncing or complex API bridges.
Support	**Single point of contact.** One team is responsible for the entire system.	**Multiple helpdesks.** High risk of vendors "blaming each other" when issues arise.
User Experience	**Consistent.** One interface, one login, and a shorter learning curve for staff.	**Fragmented.** Staff must learn and jump between multiple apps.
Maintenance	**Automatic.** System updates are managed by the vendor to ensure compatibility.	**Complex.** An update in one app can "break" the connection to another.
Total Cost (TCO)	**Predictable.** One subscription / maintenance fee with no hidden integration costs.	**Variable.** Multiple subscriptions plus the ongoing cost of maintaining integrations.
Reporting	**Real-Time.** A single "version of the truth" across the whole company.	**Manual.** Requires exporting and merging data from different systems.

The Single-Vendor advantage: Seamless growth

A single-vendor, integrated ERP, like Profit4 from OGL Software, acts as a central nervous system for your business. Everything from the first customer enquiry to the final delivery note happens inside one single environment.

1

Unified Data

When a sale is made, stock levels update instantly, and the ledger is balanced automatically. There is no syncing, no waiting, and no "data lag."

2

A Single Point of Accountability

If you have a question or an issue, you have one phone number to call. One team is responsible for the entire journey of your data, eliminating finger-pointing.

3

Lower Total Cost of Ownership (TCO)

While individual "best-of-breed" apps might seem cheaper, the cost of custom integrations, multiple subscription fees, and the internal IT time required to manage them usually far exceeds the cost of a single integrated platform.

4

Consistent User Experience

Your team only needs to learn one interface. This speeds up onboarding and makes it easier for staff to move between departments (e.g., a salesperson can easily check warehouse status because the screens look and behave the same).

The Verdict: If your goal is scalability and simplicity, a single-vendor solution is almost always the superior choice for mid-sized businesses looking to professionalise their operations.

Navigating the software demo

Software demos are designed to look perfect

To see the reality, you must take control of the meeting:

1

Use Your Data

Ask the vendor to demonstrate a specific workflow using your actual business scenarios.

2

Look Past the UI

A pretty dashboard is useless if the underlying logic is rigid. Ask about configuration limits and what happens when your business scales.

3

Watch for Red Flags

If a vendor avoids questions about implementation timelines or cannot demonstrate how a specific requirement is handled without "bespoke coding," proceed with caution.

Planning for the human element

Most failures stem from poor change management

Effective ERP implementation requires prioritising the "human element" through comprehensive, person-to-person training rather than relying solely on documentation.

Key success factors include choosing a vendor with responsive, UK-based support for long-term partnership, and utilising a phased, milestone-based rollout to drive immediate value.

Training

Does the vendor offer on-site as well as on-demand video training, or just a PDF manual?

Support

Check their UK-based support credentials. What are their response time guarantees (SLAs) for critical issues?

Phased Rollout

Don't try to flip the switch on everything at once. Plan a realistic timeline with clear milestones.

Shaped by our clients: We learn and evolve through their experience

Real-world evidence from OGL Software case studies indicates that prioritising the human element—through tailored training, responsive UK-based support, and phased implementation—is critical for successful ERP adoption.

Effective implementations involve hands-on support and structured, milestone-driven, or gradual rollouts.

Read the full case studies at OGL Software

The "Real World" check: Vendor references

Every vendor has a list of happy clients. To get the truth, ask their referees:

What was the one thing you wish you knew before the implementation started?

How has the total cost of ownership (TCO) changed since year one?

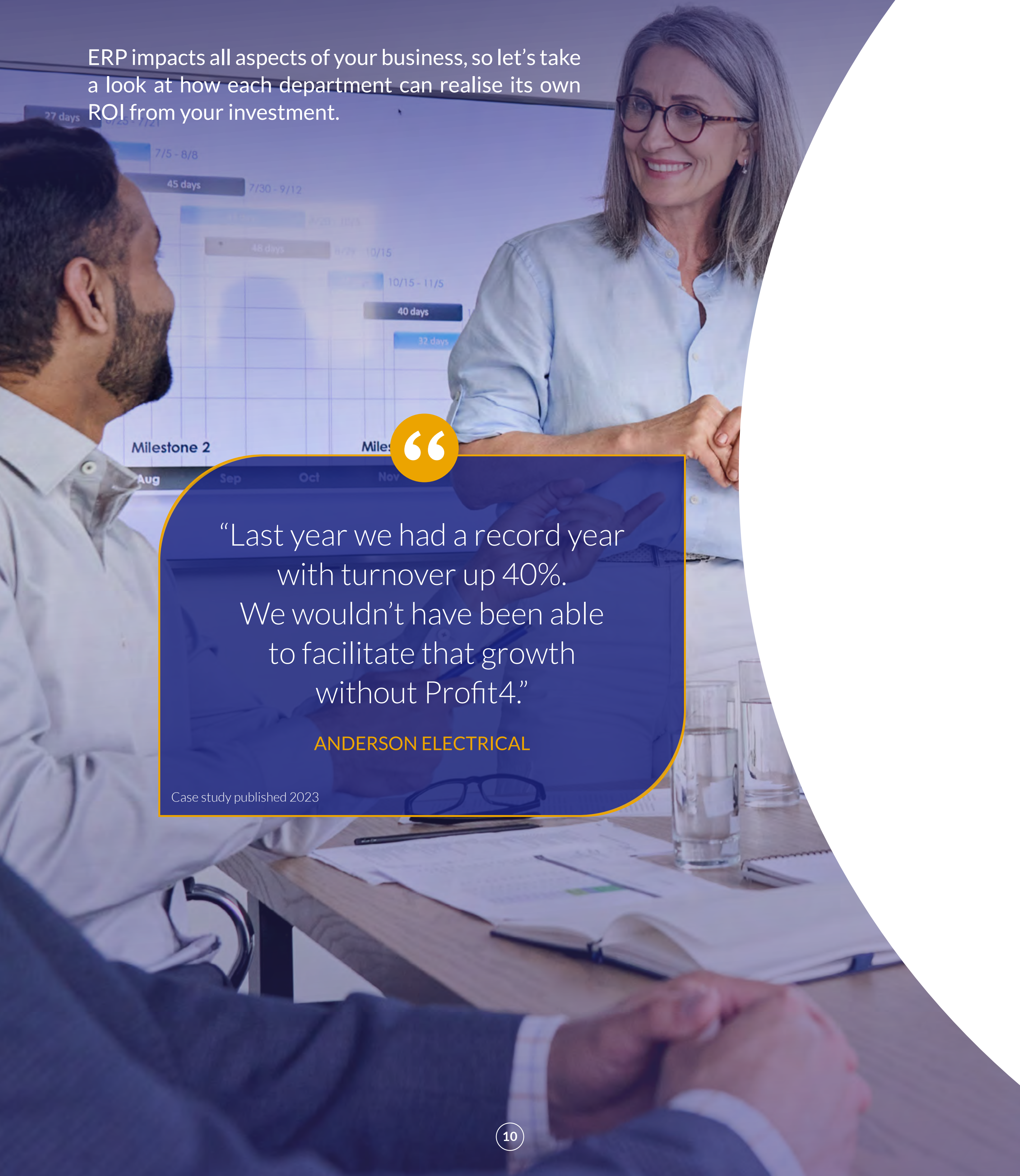
When the system went down or a bug appeared, how did the vendor handle it?

Next steps: Your ERP success path

An ERP is a 10-year decision. By following this guide and prioritising your business requirements over software "bells and whistles", combined with choosing a partner with a proven support structure, you ensure your investment delivers a return for years to come.

ROI across every department

ERP impacts all aspects of your business, so let's take a look at how each department can realise its own ROI from your investment.



> "Last year we had a record year with turnover up 40%. We wouldn't have been able to facilitate that growth without Profit4."
>
> ANDERSON ELECTRICAL

Case study published 2023

Directors & Management

At the most senior level you need to maintain a global view of how your business is performing, but how can you do that when departments are working in data silos.

Top 5 objectives for ERP implementation

- Full visibility of business performance / KPIs
- Connect all areas of your business to improve profitability
- Streamline operations to drive efficiencies and free up time to be more proactive
- Save hours of work by not having to manually review disparate data reports
- Improve customer satisfaction

Choosing an ERP solution that presents key real-time data from across your business in a single dashboard can transform how you view your business and enable you to make more informed decisions.

Where's the ROI for management?

Bring together sales, supplier orders, stock and financial data into a single view to help you spot potential cash flow problems or bottle necks in your processes.

Identify your bestsellers and automate reordering to ensure you are never out of stock of key items and don't lose a sale or valued customer.

Understand what dead stock you are carrying so you can take decisive action to maximise space in your warehouse and calculate more accurate stock valuation.

Track sales performance to ensure everyone stays on target and commercial growth objectives are met.

Quickly pinpoint problem areas, identify staff training needs, spot potential sales leakage so you can take proactive action to protect your business' reputation and improve performance.

Sales & Marketing

With the growth of online trading, it's now so easy for customers to shop around and find the best deals. So being able to sell smart and stand out from the crowd whilst ensuring the whole customer buying experience is as easy as possible is now more important than ever.

Top 5 objectives for ERP implementation

- Measure success against targets
- Automate upsell and cross-sell opportunities
- Convert more quotes to sale
- Deliver targeted marketing campaigns
- Access critical business data remotely

Where's the ROI for sales & marketing?

360-degree view of key customer information to easily manage sales opportunities.

Segment your data to deliver highly targeted marketing campaigns to increase lead generation and sales conversion.

Increase order values through targeted upsell and cross-sell prompts across your sales channels.

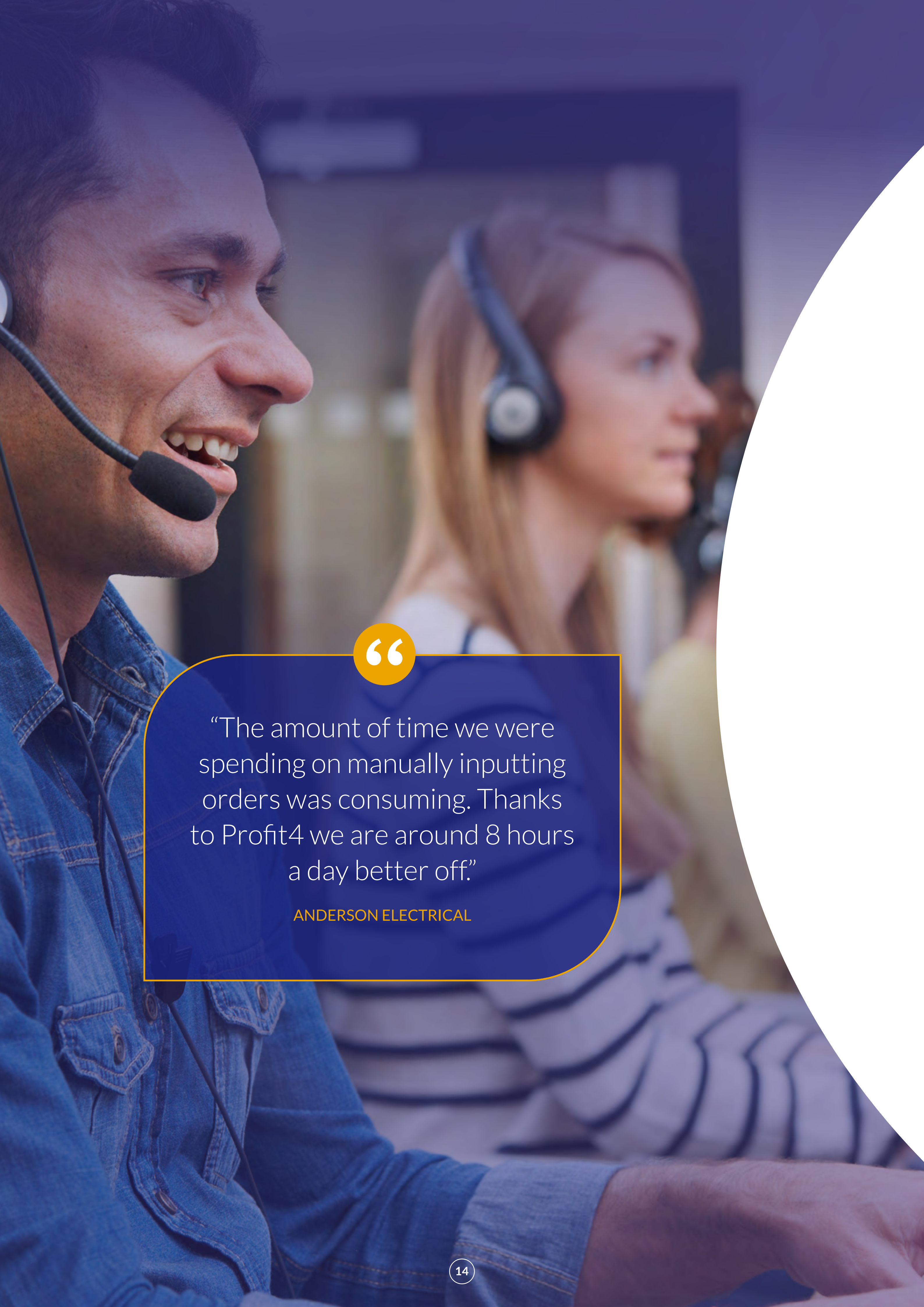
Send automated emails to follow up enquiries / quotes generated to convert more sales.

Customised dashboards increase visibility of performance against targets.

Choosing an ERP solution that integrates with all your sales channels and delivers real-time data on stock levels and profit margins can arm sales and marketing teams with the tools they need to secure leads and sales quickly.

“Having more time to focus on business development has resulted in an increase in turnover and profit and they are the numbers that matter.”

BROADBENT INDUSTRIAL SUPPLIES



> “The amount of time we were spending on manually inputting orders was consuming. Thanks to Profit4 we are around 8 hours a day better off.”

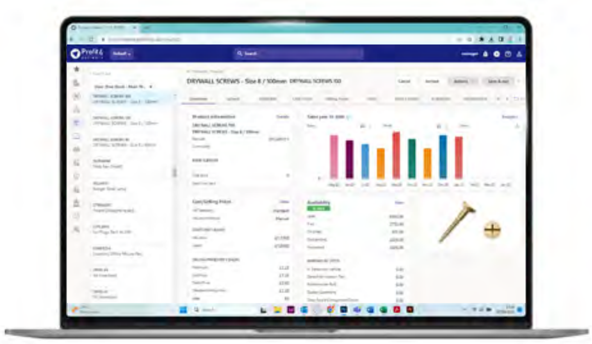
ANDERSON ELECTRICAL

Order Processing Team

With the growth in multi-channel operations, streamlined order processing is now critical to improve profitability whilst maintaining excellent customer service that sets you apart from your competition.

Top 5 objectives for ERP implementation

- Maximise productivity
- Enable staff to negotiate and offer flexible pricing within agreed parameters
- Outperform the competition
- Deliver excellent customer service
- Easily manage multi-channel orders



Choosing an ERP solution that is feature-rich to simplify labour-intensive tasks can set you apart from the competition as you can pick, pack and ship more effectively.

Where's the ROI for the order processing team?

Automate key processes and remove duplication of tasks to manage higher volume of orders without extra staff.

Manage all orders, from any channel, through a single system to drive efficiencies and ensure stock to meet customer demands.

Visibility of real-time, data driven stock levels means never having to say to customers that you "will call them back when you have checked stock" and risk losing a sale.

Reduce the cost of returns by automating returns assessment and refunds and returning items to stock without the endless admin.

Real-time negotiation to secure an order using price bands, special customer pricing and quantity breaks, whilst protecting profit margins.

Customised dashboards track your bestsellers and potential sales leakage so you can take proactive action and make smarter decisions.

Warehouse Team

As your business grows, your warehouse and stock management team are placed under increasing pressure to get orders out faster. If they are spending hours searching for products and generating manual paperwork and labels, it can impact your customer service and lead to increasing overheads as you take on more staff to deal with the growing workloads.

Top 5 objectives for ERP implementation

- Optimise your warehouse for faster picking
- Streamline your operations by automating dispatch and carrier integration
- Improve customer service and order tracking
- Reduce training time for new / seasonal staff
- Reduce storage costs and the impact of stock taking

Where's the ROI for the warehouse team?

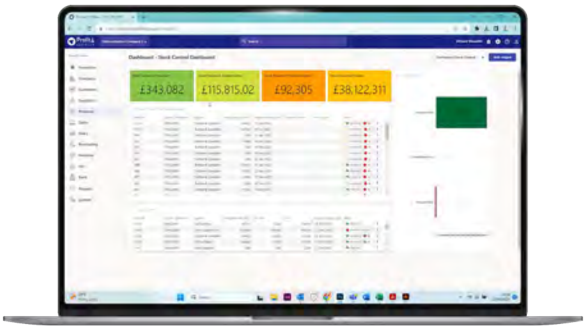
Optimising picking and shipping can save hours of work and ensures accurate information is pulled into the shipping labels reducing errors and avoiding delays.

Annual stock takes can be time consuming and costly so moving to a perpetual stock take system can remove the burden and provides accurate up-to-date stock data at any time.

Automating manual tasks and documentation creation enables you to manage an increase in orders without the need for additional overheads.

Training new staff can take time, especially if you have a large warehouse or lots of similar products – simplifying this process saves time and ensures new staff are effective more quickly.

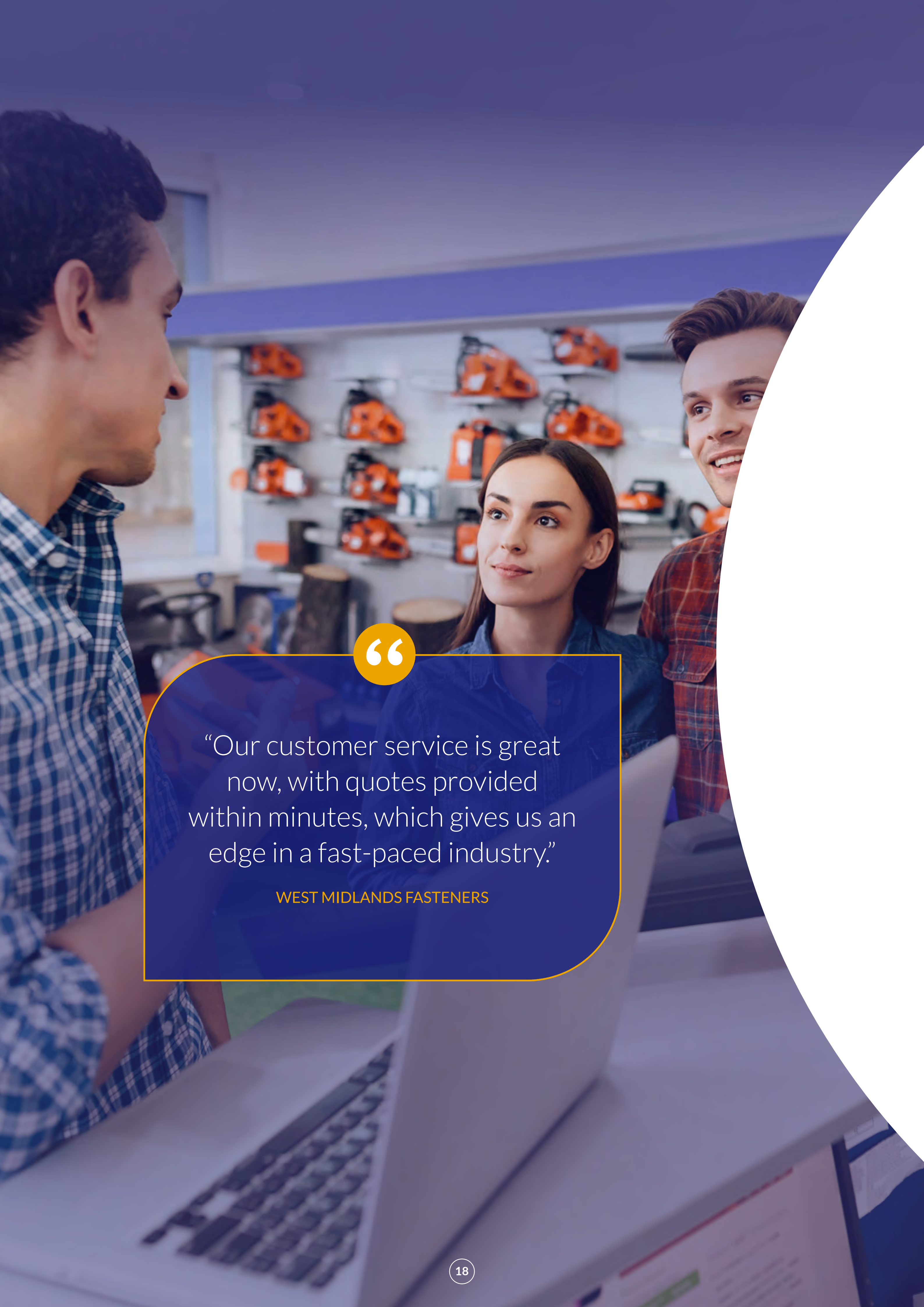
Optimising your stock through pre-defined minimum, maximum and optimum stock levels based on sales data improves the efficiency of your warehouse and reduces risk of over or under-stocking.



Choosing an ERP solution that connects the heart of your operation with the rest of the business creates a smooth, efficient and reliable warehouse.

"Using Profit4, we can now identify the exact bin location for individual products, which makes life easier. We use it in the warehouse for stock transfers, which are now done in just a few clicks. We can [also] check whether the stock item requested is available for same day delivery if that's what the customer wants, or whether we need to order it in."

WEST MIDLANDS FASTENERS



“Our customer service is great now, with quotes provided within minutes, which gives us an edge in a fast-paced industry.”

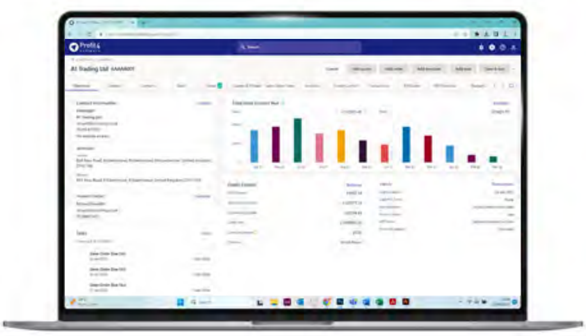
WEST MIDLANDS FASTENERS

Customer Service

Delivering a first-class customer service is a key objective for all businesses as it not only protects your reputation but also drives repeat business.

Top 5 objectives for ERP implementation

- Easy access to real-time order updates
- 100% customer visibility
- Central record of all communications
- Get orders out faster and with greater accuracy
- Access critical information to answer customer queries



Choosing an ERP solution that provides you with a complete picture of your customers ensures your customer service is first-class and you can access all the information you need when you need it.

Where's the ROI for the customer service team?

Automation of key processes and removal of duplication of tasks enables the order processing team to manage higher volumes of sales without the need for more staff.

Provide customers with real-time updates on their orders whilst on the phone or via regular automated emails gives customers peace of mind and keeps them coming back.

Visibility of stock and all orders ensures customer service teams can manage customer expectations and offer alternative products where needed.

Automated order processing reduces the risk of human error, so customer service teams spend less time dealing with admin errors and increase customer satisfaction levels.

Sales teams are more proactive as they have key information and pricing options to hand driving greater conversion of quotes to sales.

A cloud-based system enables customer service representatives to deliver the same high standard of service and real-time updates whether in the office or at home.

Finance & Purchasing

To sell smarter you need to buy better so having access to data-driven insights to inform smarter financial decisions is key to a more profitable future.

Top 5 objectives for ERP implementation

- Make more informed decisions
- Improve cash flow
- Complete visibility of the business
- Real-time financial data
- Automate manual processes

Where's the ROI for the finance & purchasing team?

Avoiding over-stocking in the warehouse, maximising sales opportunities by reducing the risk of under-stocking and preventing orders being placed for customers that are on-stop are all effective ways to improve cash flow.

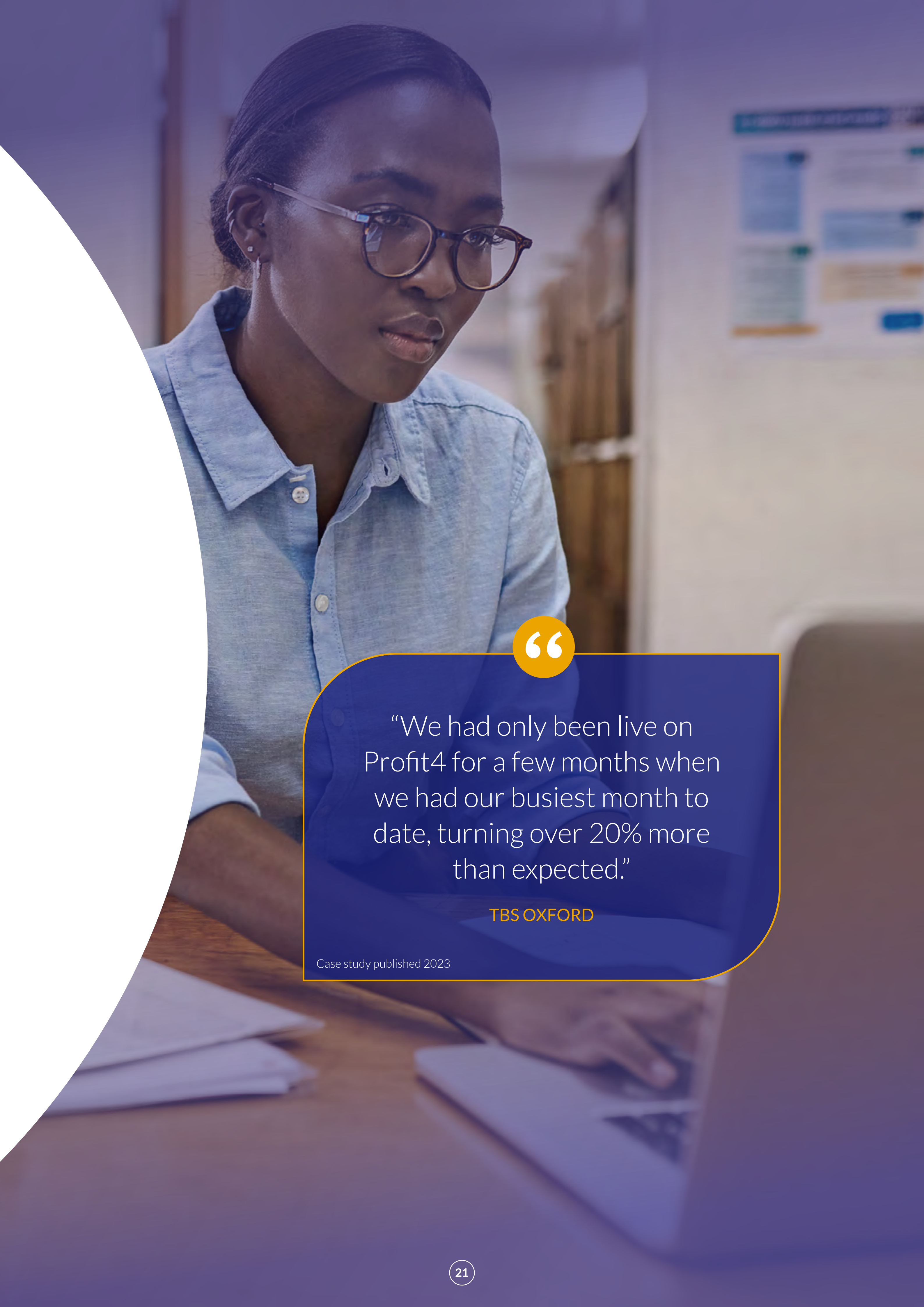
Automated bank feeds leverage AI machine learning technology to reduce the lengthy admin process of matching bank transactions with customer and supplier invoices.

Linking stock, orders and financial data in a single system enables invoices to be automatically generated when goods are dispatched speeding up the process and reducing the risk of human error.

Make smarter purchasing decisions based on historic and real-time sales data to ensure you are ready for peak seasonal periods.

Trigger purchase orders based on pre-defined minimum / maximum stock levels, to fulfil sales orders, or reduce manual admin and risk of stock-outs.

Choosing an ERP solution that automates outdated and manual paper-based accounting processes and presents key financial performance data through customisable dashboards is a vital tool for the modern, busy accounts team.



“We had only been live on Profit4 for a few months when we had our busiest month to date, turning over 20% more than expected.”

TBS OXFORD

Case study published 2023


Profit4 software
Customers / Customer
A1 Trading Ltd AAAAA001
Search
Overview
General
Contacts
Tasks
Notes 2
Quotes & Orders
Sales Order Lines
Analytics
Credit Control
Transactions
Attributes
VAT/Nominal
Cancel
Add quote
Add order
Add template
Contact information
AAAAA001
A1 Trading Ltd
richard@a1trading.co.uk
01299 873873
No website address
Details
ADDRESSES
Invoice
85A New Road, Kidderminster, Kidderminster, Worcestershire, United Kingdom, DY10 1AE
Delivery
85A New Road, Kidderminster, Kidderminster, United Kingdom, DY10 1AE
PRIMARY CONTACT
Richard Meredith
richard@a1trading.co.uk
01299873873
Contacts
Tasks
Showing 4 of 1255 tasks
Tasks
Sales Order Due Out
26 Jan 2023
Sales Order
Sales Order Due Out
26 Jan 2023
Sales Order
Sales Order Due Out
25 Jan 2023
Sales Order
Sales Order Due Out
25 Jan 2023
Sales Order
Total Sales Current Year
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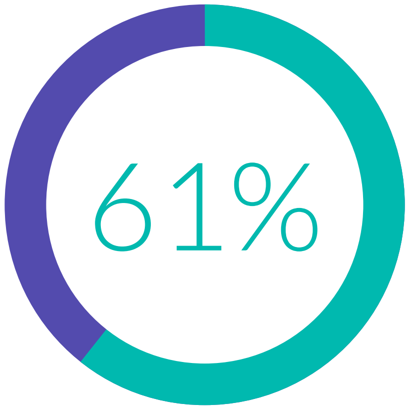
Profit
Apr 21
May 21
Jun 21
Jul 21
Aug 21
Sep 21
Oct 21
Nov 21
Dec 21
Credit Control
Total balance
Outstanding orders
Outstanding quotes
Credit limit
Overdue Balance
Currency
Balances
£9592.14
£632577.24
£32294.48
£1000000.00
£0.00
British Pound
STATUS
Last transaction
Cash/Pro forma
Payment terms
Account status
VAT Status
Nominal category

Conclusion

When budgets are squeezed and tough decisions need to be made, the temptation to put off investments in software can be overwhelming.

However, as you can see, investing in the right ERP system can deliver tangible ROI in all areas of your business. By making the smart decision, you'll boost profitability, improve productivity and empower your teams to work more effectively. Ultimately the ROI on an investment in ERP far outweighs the cost and, more importantly, the cost of not investing in ERP would have on your efficiency as a business and in restricting your growth potential.

Stay ahead of your competitors and start looking at how you can drive efficiencies in your business today.

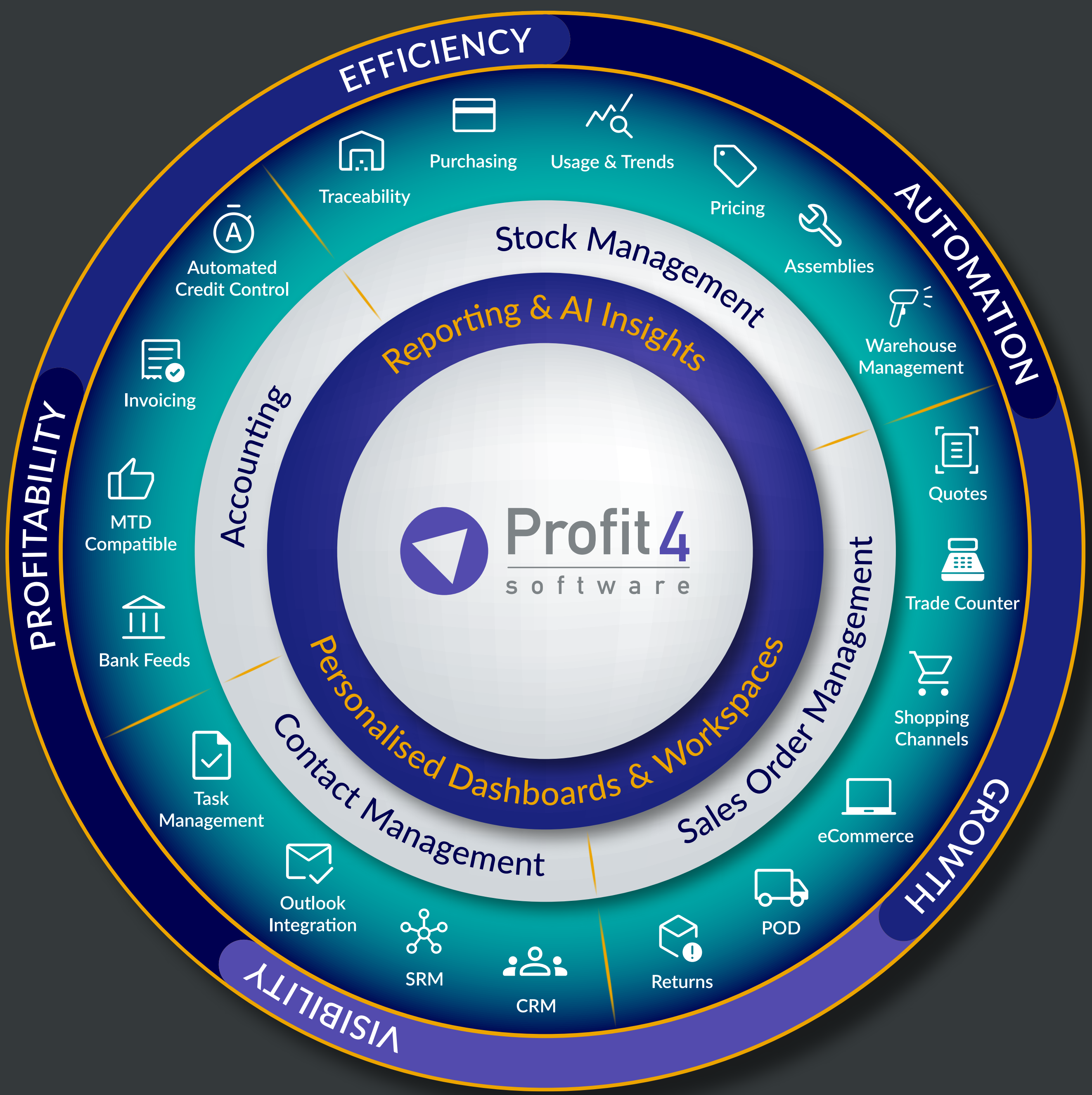


61% of businesses plan to spend more on software in the next year

"You shouldn't be worried about any initial costs of implementing an ERP system, you should be worried about the hidden costs of what you are doing right now. You'll save so much time when you have the right system as its doing everything for you and doing it properly."

TBS OXFORD

Source: Gartner Digital Markets 2024 Global Software Buying Trends


EFFICIENCY
AUTOMATION
GROWTH
VISIBILITY
PROFITABILITY
Traceability
Purchasing
Usage & Trends
Pricing
Assemblies
Warehouse Management
Quotes
Trade Counter
Shopping Channels
eCommerce
POD
Returns
CRM
SRM
Outlook Integration
Task Management
Bank Feeds
MTD Compatible
Invoicing
Automated Credit Control
Stock Management
Sales Order Management
Contact Management
Accounting
Reporting & AI Insights
Personalised Dashboards & Workspaces
Profit 4
software

Profit4
software

Innovative ERP software for UK merchants, distributors and wholesalers

Profit4 is a fully integrated business and stock management system that manages your key business processes including CRM, SRM, Sales Order Processing, Stock Control & Management, Accounts & Invoicing, Assemblies & Kitting, Warehouse Management, Sales Analysis, Shopping Channel Integration (i.e. eBay and Amazon) and eCommerce integration.

Profit4 powers growth

Our ERP solutions are used by hundreds of small to medium-sized businesses and thousands of users across a range of sectors including agriculture, bearings & transmissions, building supplies, catering equipment & supplies, cleaning & janitorial, electrical & lighting, fasteners & fixings, healthcare, medical, veterinary & scientific, hair & beauty, horticulture, hydraulics & pneumatics, ironmongery & architectural hardware, paper & packaging, pipes & valves, plumbing & heating, tools & machinery, workwear & safety equipment, to deliver greater efficiencies, improved productivity and increased profitability.

A big company, with a family feel

We're proud to be a family-run business working closely with our customers to deliver a first-class service and support them as they grow and drive their own businesses forward.

What sets our Cloud ERP software apart?

Our award-winning onboarding process ensures you are supported throughout the whole process from initial consultancy, training, data transfer, system configuration, implementation and user support. Once you go live you will have your own dedicated Customer Success Manager to ensure you continue to get the maximum benefit from the system and you realise ROI on your investment as quickly as possible.

"Having a dedicated Account Manager is brilliant, someone so knowledgeable to talk with and discuss how we can improve and utilise Profit4 as much as possible. I feel the OGL team have been there from the start and are continuing this journey with us."

COTSWOLD HOSE & FITTINGS

Take the first step today and watch our quick demo video

Get in touch

For more information on how Profit4 can deliver tangible benefits for your business, or to arrange a more personalised demo contact our sales team.

Email us **software@ogl.co.uk**
or call us on **01299 873873**

OGL Software

OGL Software Limited, Worcester Road, Stourport on Severn,
Worcestershire, DY13 9AT

Tel **01299 873 873**

Email **software@ogl.co.uk**

1380 MAR GDE 300626 B