Is It Time to Migrate to a New ERP?

Every growing business reaches a point where the tools that once supported success start to limit progress. If you're running a legacy ERP system, it may no longer be keeping up with the pace of your business.

Review the checklist below. If several of these challenges resonate, it might be time to consider your next move.

SCALABILITY CHALLENGES

- ☐ I need functionality that my current ERP doesn't support.
- ☐ My system struggles to handle growing data volumes.
- ☐ I've had to patch together third-party tools, increasing costs and complexity.
- ☐ I rely on manual workarounds for key business processes.
- ☐ I need support for multi-company, multi-currency, or multi-language operations.
- ☐ My ERP doesn't support industry-specific needs or custom workflows.

LIMITED INSIGHT & REPORTING

- ☐ It's difficult to get timely, accurate data for decision-making.
- ☐ I'm unsure whether reports are current or reliable.
- ☐ Only a few team members can create reports, slowing down access to information.
- ☐ I'm consolidating data from multiple systems without a clear source of truth.
- ☐ My reports lack depth, customization, and flexibility.
- ☐ I use tedious workarounds like subaccounts to get deeper data insights.
- ☐ I lack visual dashboards that give real-time business visibility.
- ☐ Data entry is delayed, making field information outdated.
- ☐ Estimating and quoting are difficult due to limited historical visibility.

SECURITY & COMPLIANCE RISKS

☐ My current ERP has too many integration points, increasing risk exposure.

☐ System maintenance and connectivity costs are rising.

☐ I delay updates because they require significant time and effort.

DATA SILOS & DISCONNECTED SYSTEMS

☐ Different departments use separate ERP instances or spreadsheets.

☐ Sharing data internally or with partners is time-consuming.

☐ We deal with conflicting versions of reports and spreadsheets.

☐ Lack of real-time visibility is slowing down our operations.

☐ Remote access is limited or unreliable.

INCREASED MANUAL WORKLOAD

☐ Human error is increasing due to manual processes.

☐ Limited user access reduces productivity and slows decisions.

☐ Updating the ERP system is labor-intensive and costly.

☐ Sales teams lack visibility into inventory, orders, or customer behavior.

SUPPORT & SERVICE ISSUES

☐ Support response times are too slow.

☐ Support staff are inconsistent in resolving issues.

☐ I struggle to find clear answers to my questions.

☐ My partner does not understand my business.

SCORING

0–5 boxes checked:

Your ERP is in great shape.
You're running smoothly with only minor gaps.
Action: Keep doing what you're doing. Review your system annually to stay proactive.

6–10 boxes checked:

Some growing pains.
Your ERP mostly works, but you're starting to feel some friction.
Action: Identify quick winsimprove processes, add tools, or explore light upgrades.

11–15 boxes checked:

Time for a serious look.
Gaps are getting in the way of efficiency and growth.
Action: Start exploring new solutions or enhancements before issues become costly.

16–20 boxes checked:

Your ERP is holding you back.
You're spending time and resources just to stay afloat.
Action: Begin planning your ERP migration, map out requirements and timelines now.

21+ boxes checked:

Your ERP is a roadblock.
It's time. Your current system is limiting growth and increasing risk.
Action: Prioritize replacing your ERP with a modern, flexible solution that can scale with your business.