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The Top 6 Actions to Take If Your ERP Doesn’t Fit Your Finance Workflows

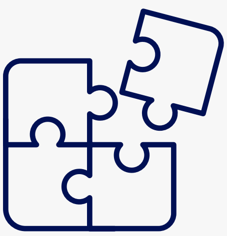
You spotted the red flag. Now what?

If Finance is relying on workarounds, manual controls, or processes that sit outside the ERP, resist the urge to patch the symptom. Use the red flag to locate where the Finance, process design, and ERP requirements have drifted apart, then begin your corrections.

Finance Workflow Red Flags and How to Course-Correct

01

The Illusion of a “One-Size-Fits-All”



What it looks like

The ERP is technically live, but Finance still bends its processes around a generic system design.

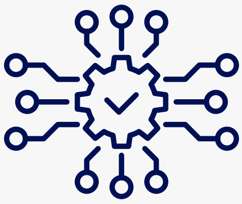
Do this next

Map the finance workflow as it actually runs today.

Capture the real handoffs, exceptions, controls, and workarounds, then identify exactly where the ERP no longer supports the process. Fix that specific gap before changing anything else.

02

Approval Process Feels Like a Maze



What it looks like

Exceptions leave the ERP and move through email, spreadsheets, or side conversations because the configured hierarchy cannot handle your specific finance rules.

Do this next

Define the approval logic before changing the workflow.

Document thresholds, delegation rules, exceptions, escalation paths, and ownership first, then configure the ERP around those agreed rules.

03

Stakeholder Engagement Matters

What it looks like

The solution technically meets project requirements, but critical processes still don’t work the way your team needs them to.

Do this next

Reconnect the requirement to the business outcome.

Bring Finance process owners back into the review and confirm this logic: What outcome must we achieve? Which process delivers it? What must the ERP enable?

04

Compliance Is an Afterthought

What it looks like

Approvals, evidence, reconciliations, or audit trails have to be reconstructed manually after transactions move through the system.

Do this next

Place the control where the risk occurs.

Identify exactly where approval, evidence, segregation, or validation is required and build that control into the workflow instead of recreating outside of the system.

05

Workflows Clash with Reality

What it looks like

Journal entries, reconciliations, close activities, and exceptions behave differently under real operating conditions than they did in demonstrations or testing.

Do this next

Test the workflow against a real Finance cycle.

Run actual close scenarios, transaction volumes, exceptions, dependencies, and handoffs through the process, then document every point where people must step outside the ERP.

06

The Blame Game

What it looks like

Finance blames the system. IT blames the requirements. The project team blames adoption. Everyone has a different explanation for the same problem.

Do this next

Replace opinions with one shared diagnosis.

Document what happened in the specific incident, the business impact, the evidence, the process or requirement involved, and who owns the next decision before deciding who or what needs to change.

Six Red Flags. One Recovery Principle.

The symptoms are different, but the corrective sequence is consistent:

See the condition → Reconnect it to the business process → Measure the gap → Stabilize the workflow → Then change the technology

See Where Finance and Your ERP Have Drifted Apart

If any of these six red flags sounds familiar, the next step is to find out how many apply and how deep the gap runs. Use our ERP Health Assessment to help identify which area (process, requirements, data, ownership, or system design) needs attention first.

Take the ERP Health Assessment

Need to work through a specific issue with someone? [Talk to DCG]