



ERP Fixers: How to Shift from Blame to Structured Recovery

A practical self-serve guide for getting your ERP initiative back under control without blame, replacement, or another round of reactive fixes.



ERP trouble can start with a poor vendor fit, a bad decision, or the wrong technology. Sometimes the vendor really is the problem. Sometimes an internal decision is. More often, several issues have compounded over time. The challenge is that knowing **who contributed to the problem** still doesn't tell you **what to do next**.

Start with four questions:

1. What are we actually trying to fix?
2. What parts of the organization does the problem affect?
3. How mature are the core processes involved today, and what level do they need to reach for success?
4. What needs to change before more investment makes sense?

Work through those questions in order. By the end, you should have a much clearer view of whether your team can course-correct internally or whether the situation needs an objective outside perspective.



01

What Are We Actually Trying to Fix?



1. What Are We Actually Trying to Fix?

A troubled ERP project can generate hundreds of open issues. That doesn't mean they all deserve equal attention. Before discussing features, integrations, vendors, or configuration, get leadership aligned on **what the ERP initiative is supposed to accomplish for the business.**

Define the Strategic Objective

What business outcomes must this initiative deliver?

Which business problems must it solve?

How will leadership know the initiative has succeeded?

What major solution or area is likely involved?

☐

Finance

☐

CRM

☐

Planning

☐

ERP

☐

Warehouse Management

☐

Other:

What level of effort or investment does the organization currently expect?

Check your alignment

☐

Leadership/stakeholders agree on the primary business outcome.

☐

The project is being discussed in terms of business outcomes, not only software modules or features.

☐

Success is defined beyond simply reaching go-live.

☐

The expected investment can be connected to something the business needs to improve.

If several of these are unchecked, **pause**. Consider the difference between:

"The vendor cannot get inventory right."

"Inventory adjustments are increasing, warehouse teams are keeping offline counts, and Finance is manually reconciling differences each month."

The vendor may ultimately be responsible. But the second statement gives the recovery team something concrete to investigate and measure against.

02

What Parts of the Organization Does This Fix Impact?



2. What Parts of the Organization Does This Fix Impact?

Once the objective is clear, identify the business processes that produce that outcome. Avoid documenting every screen, field, or click. That level of detail comes later.

Right now, the question is:

Where does this problem actually appear through the business?

An issue that appears to belong to Finance may begin upstream in Sales. An inventory issue can affect procurement, warehousing, fulfillment, accounting, and reporting. An invoicing problem may originate several steps before the invoice is ever generated.

Map the Core Processes

Choose the processes most directly connected to the outcome you identified above.

Core Process	Business Outcome It Supports	Process Owner	Teams/ Processes That Depend on It	Systems or Modules Supporting It	Where Is It Under Pressure?	Current Workaround
Inventory Management	Accurate inventory availability and financial reporting	Warehouse/ Operations	Procurement, Sales, Fulfillment, Finance	ERP, WMS	Inventory adjustments increasing; system counts disputed	Offline warehouse counts and manual Finance reconciliation

03

**How Mature Are Those
Core Processes Today,
and Where Do They
Need to Be?**



3. How Mature Are Those Core Processes Today, and Where Do They Need to Be?

You identified the affected core processes in the previous section. Now assess each one to determine **how mature each critical process is today and how mature it actually needs to become.**

A common mistake in ERP recovery is seeing a visible problem and jumping immediately to a technology fix. That can add cost without addressing the underlying condition. To best understand how the technology can help, additional discovery is needed.

Surveillance: Can We See What Is Happening?

Do teams have reliable visibility into the process, data, and exceptions?

Ask:

- Can we see what is happening before month-end?
- Can we identify exceptions as they occur?
- Do teams trust the underlying data?
- Are Finance, Operations, and IT working from the same basic facts?

If you cannot answer Yes to most of these questions, the process has not yet reached Surveillance.

Example

Warehouse activity is visible in the ERP, but teams still rely on offline counts because they do not trust the inventory balance.

Current maturity: Below or still working toward Surveillance.

Performance: Can We Measure Whether It Is Improving?

Once the process is visible, determine whether its performance can actually be measured.

Ask:

- Do we know what information tells us this process is healthy?
- Is there an agreed-upon baseline?
- Do we know what “good” looks like for this process?
- Do stakeholders have access to the information in a timely manner to make decisions?
- If recovery work improved this process, would we know?

If you cannot answer Yes to most of these questions, consider data solutions before technology solutions.

Example

The team now trusts the inventory data, but there is no agreed target for inventory accuracy, adjustment frequency, or exception volume.

Next maturity target: Performance.

Excellence: Can We Run the Process Consistently?

Measurement alone does not make a process stable.

The organization also needs consistent rules, ownership, handoffs, and exception handling.

Ask:

- ☐ Can the process sustain the expected level of performance over time?
- ☐ Do teams know which actions to take when performance drops?
- ☐ Is there clear ownership for each part of the process?
- ☐ Are standard procedures and decision rules consistently followed?
- ☐ Are exceptions handled through a defined and repeatable process?
- ☐ Would different employees respond to the same situation in roughly the same way?

If you cannot answer Yes to most of these questions, the process has not yet reached Excellence.

Example

Inventory accuracy is measured, but different warehouses use different adjustment and cycle-counting practices.

The next step is process consistency and ownership, not more automation.

Automation: Is the Process Ready to Scale?

Consider automation only after you've achieved excellence in the process. Before adding automation or AI, confirm that:

Ask:

- ☐ Is the underlying data trusted?
- ☐ Is process performance measurable and stable?
- ☐ Are workflows and decision rules repeatable?
- ☐ Are exceptions predictable and clearly owned?
- ☐ Can automated outcomes be monitored and corrected when necessary?

If you cannot answer Yes to most of these questions, the process is not ready for additional automation.

Example

Once inventory data is reliable, performance targets are established, and operating rules are consistent across locations, the organization can make an informed decision about where automation will create value.



Map the Current State Against the Required State

Not every process needs to reach the same level or require “maximum technology.” The objective is the **right level of maturity for the business outcome.**

Use the processes you identified earlier:

Core Process	Where Are We Today?	Where Do We Need to Be?	What's the Gap?	What Do We Need to Get to the Target State?
Inventory management	☒ Surveillance	☒ Performance	Teams can see inventory data but don't trust the measures enough to manage against them.	The immediate priority is establishing reliable inventory measures and ownership.
	☐ Surveillance ☐ Performance ☐ Excellence ☐ Automation	☐ Surveillance ☐ Performance ☐ Excellence ☐ Automation		
	☐ Surveillance ☐ Performance ☐ Excellence ☐ Automation	☐ Surveillance ☐ Performance ☐ Excellence ☐ Automation		
	☐ Surveillance ☐ Performance ☐ Excellence ☐ Automation	☐ Surveillance ☐ Performance ☐ Excellence ☐ Automation		

If Finance, Operations, IT, or your implementation partner rate the same process at different maturity levels, DCG can help independently establish the current state and the level the process actually needs to reach.

04

What Needs to Change First?



4. What Needs to Change First?

You should now have three pieces of information:

① The **business outcome** you are trying to protect or improve.

① The **core processes** that influence that outcome.

① The **current maturity and required maturity** of each process.

① The **gaps preventing those processes from reaching the required state**.

Now turn those findings into a small number of recovery priorities. You do not need detailed technical requirements yet. You need enough clarity to answer:

What do we need to change first to make the maximum impact on recovery?

Build Your Recovery Priorities

Complete the assessment columns first. For each core process, identify the maturity gap, define what needs to change, and test whether that change supports the strategic objective and can be measured. **Then assign its priority.** This keeps the ranking grounded in business impact and recovery need rather than urgency, opinion, or whichever issue is getting the most attention.

Priority	Core Process	Current Target Maturity	What Needs to Change?	Supports Strategic Objective?	Addresses the Maturity Gap?	Can Improvement Be Measured?	Owner
1	Inventory Management	Surveillance > Performance	Establish trusted inventory measures, baseline, targets, and ownership	☐ Yes ☐ No ☐ Unclear	☐ Yes ☐ No ☐ Unclear	☐ Yes ☐ No ☐ Unclear	
3				☐ Yes ☐ No ☐ Unclear	☐ Yes ☐ No ☐ Unclear	☐ Yes ☐ No ☐ Unclear	
2				☐ Yes ☐ No ☐ Unclear	☐ Yes ☐ No ☐ Unclear	☐ Yes ☐ No ☐ Unclear	

If the team cannot clearly connect an action to the strategic objective, an identified maturity gap, and measurable improvement, investigate further before prioritizing that pieces of recovery and allocating more budget.

Once the recovery priorities are clear, the team can move into detailed requirements, estimates, sequencing, and delivery with much stronger footing.

DCG can help turn competing process gaps into an ordered recovery roadmap, giving leadership a defensible view of what should happen first, what can wait, and where additional investment will create the most value.

Your ERP Recovery Check

Before approving the next major round of ERP work, step back and review what you have established.

Strategic Objective 01 We agree on what the ERP initiative must accomplish. We agree on which business problems need to be corrected. Success is defined in measurable business terms. Finance, Operations, IT, and leadership describe the objective consistently.	Core Processes 02 We know which core processes are most affected. We understand the important upstream and downstream dependencies. Major workarounds and pressure points are visible. Ownership is clear for each critical process.
Process Maturity 03 We have assessed the current maturity of each priority process. We agree on the maturity each process needs to reach. We understand what is preventing each process from reaching that state. Our assessment is based on evidence, not assumption.	Recovery Priorities 04 We agree on what needs to change first. Priorities are ranked rather than treated equally. Every priority has an owner. We know how improvement will be measured. Additional investment can be connected to an agreed business outcome and maturity gap.

What Does Your Check Tell You?

Mostly checked You probably have enough alignment to begin moving into detailed requirements, sequencing, estimates, and execution. Protect the alignment you have created. As the work becomes more technical, continue tracing decisions back to the business objective and process gap they are meant to address.	Several unchecked Pause before authorizing another wave of configuration, customization, or automation. There are still unresolved questions upstream. Additional delivery work may increase cost without resolving the underlying condition. Return to the sections where your team could not reach agreement and settle those questions first.
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When Self-Serve Stops Being Enough

This guide can help your team structure the diagnosis. It cannot independently determine which side of a disputed issue is correct. An outside perspective becomes valuable when:

- Leadership cannot agree on what the ERP initiative is supposed to recover.
- Finance cannot confidently defend additional spending.
- Critical data remains disputed or unreliable.
- Process ownership is unclear.
- Internal priorities and vendor recommendations conflict.
- Requirements keep changing because the business objective is still moving.
- Major workarounds exist, but nobody can agree on why they are necessary.
- The team understands the problems individually but cannot agree on the recovery sequence.
- Confidence in the program has deteriorated after repeated course corrections.

At that point, continuing to debate the project internally usually creates more delay. If this exercise surfaced competing priorities, unresolved process gaps, unclear ownership, or investments your team cannot confidently defend, DCG can help establish the condition independently.

We work across business, process, and technology to determine **what needs stabilizing, what deserves further investment, and what should stop consuming time and budget.**

[Talk to DCG](#)



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