ERP Evaluation Business Needs Worksheet

Use this worksheet to identify current business issues you want your new solution to address, and define the expected outcome

Leverage your work from the "ERP and CRM Evaluation Early Assessment Guide" to list your top business issues and what you might want to accomplish with the help of a business management system, and then list them in their current and optimal states. Rank their importance to your organization. Name stakeholders and decision makers, identify next steps to be taken by decision makers, and establish a target date for these next steps.

*Priority Rank

1. Critical for business success; high overall benefit potential
2. Important for business; significant overall benefit potential
3. Business opportunity for improvement; operational and financial benefit potential
4. Business opportunity for improvement; small area of operations benefit potential
5. Great professional opportunity, time and resources permitting; low benefit potential

Business Issues	Current State	Optimal State	*Priority Rank	Stakeholders	Next Steps	Target Date

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