

# ERP Evaluation Stakeholder Priority Guide

Use this worksheet to help identify which key stakeholders will be most affected by the proposed business solution and how you can help them see the benefits to build support for the project organization wide.

As you assess business issues in your organization, you will be more successful if you view change through the eyes of the stakeholders across the organization. Below are key roles and business issues that are shared in many organizations. The roles listed can help move your company in a healthy direction, or at least influence a decision in favor of improvements to productivity, processes, and profitability. You can use the (bulleted) talking points to promote conversation for beneficial change, to find out more about participant concerns, and to discuss participants' suggested resolutions. Building an informed consensus to support a change in business management technology will provide the foundation for a successful project.

Key role	Business Issues
<b>Chief executive officer (CEO)</b>	<ul style="list-style-type: none"><li>• The business may not be growing as planned, or may even be losing profits. And it's becoming visible to people outside the organization.</li><li>• It is difficult to obtain reliable, complete financial reports, other reports, and base strategic planning for them. As the CEO, you are comfortable making business decisions, but you want more solid evidence to go by.</li><li>• The company is not maintaining leadership in its industry, but instead reacts to what competitors are doing.</li></ul>
<b>Chief financial officer, finance director</b>	<ul style="list-style-type: none"><li>• Financial reporting and financial regulatory compliance are inefficient, not completely dependable business processes.</li><li>• Closing the books at the end of every month can take weeks.</li><li>• The quality of financial information in the company's data stores is sometimes questionable.</li><li>• The company's profitability is jeopardized by factors such as high-cost of operations, low worker productivity, and lower-than-expected incoming revenue.</li></ul>
<b>Chief technology officer, Chief information officer, IT director</b>	<ul style="list-style-type: none"><li>• The company's IT systems don't support an optimal level of efficiency, productivity of employees, and business processes.</li><li>• Data sources, business management systems, and the business software on people's desktop computers don't integrate with each other. IT is spending too much time and effort helping employees find information, create reports, and perform frequently reoccurring tasks.</li><li>• With current IT resources, supporting, customizing, and maintaining the company's software technology is a continuous challenge. IT never gets to operate as a strategic asset to the company, but is mostly busy reacting to emergencies.</li><li>• If the company were to conduct a return on investment study today, it's a safe bet that the results would not make anybody happy.</li></ul>

Key role	Business Issues
<b>Vice president manufacturing operations, chief operations officer</b>	<ul style="list-style-type: none"> <li>• The company's product offerings are fine for many customers, but it would be much better if there was a way to customize them for high-volume customers to maintain their business.</li> <li>• The cost of making or assembling products is too high, eroding the company's profit margins.</li> <li>• Staffing levels in the company's manufacturing and operations teams are consistently high, but these elevated numbers (of workers) don't appear to work efficiently enough to meet delivery promises and keep customers happy.</li> <li>• Business conditions change, but the company has a hard time adjusting. When a supplier drops out or raises prices, the company finds it difficult to work with other resources and keep manufacturing operations moving.</li> <li>• Capacity issues make it difficult to run a successful business. Sometimes, people stand around without enough to do. Other times, orders and materials to be completed stack up and form a large backlog.</li> </ul>
<b>Vice president sales, sales manager</b>	<ul style="list-style-type: none"> <li>• Sales forecasts don't connect to manufacturing and materials planning. But it's almost better that way because they are not very accurate anyway.</li> <li>• Sales teams don't reach their quota for a number of reasons. For one thing, distribution and manufacturing can't keep up with a high-order volume.</li> <li>• Sales staff does not have good access to all the customer and pricing information they need. They always have to make the customer wait while they find out an answer.</li> <li>• Sales managers don't really understand customer's preferences and purchasing behavior so they find it difficult to anticipate what customers need.</li> </ul>
<b>Vice president marketing</b>	<ul style="list-style-type: none"> <li>• Marketing finds it difficult to execute a targeted strategy to reach more potential customers and markets.</li> <li>• The company does not have a good understanding of who its customers are and what they want.</li> <li>• The reduced flow of solid, productive leads from marketing to sales does not justify the money spent on marketing efforts.</li> </ul>
<b>Vice president human resources, human resources manager</b>	<ul style="list-style-type: none"> <li>• The company's investments in people and skills are not paying off. Worker productivity is low, even when people are working hard.</li> <li>• Human resources managers are finding it difficult to design the kind of workforce that is optimal for moving the company forward.</li> <li>• The company is not known as an employer that understands how to make its people successful in their tasks. For that reason, recruiting does not attract the best job candidates.</li> </ul>

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<b>Vice president customer service, services manager</b>	<ul style="list-style-type: none"> <li>• The service department maintains a high volume of difficult, unresolved customer interactions that need a second or third call or escalation.</li> <li>• Service department workers are unable to work well with a large number of customers. If the company grew, it would have a significant service level issue.</li> <li>• Field service workers often do not have all of the information they need to serve customers well.</li> </ul>
<b>Production manager</b>	<ul style="list-style-type: none"> <li>• When you have the materials you need, you often don't have enough people on the shift to move production along. Other times, you have more people than you want, but you run into materials shortages.</li> <li>• Your processes don't result in consistent quality in the products you make or assemble. You want someone to be responsible for that.</li> </ul>
<b>Accounts receivable manager</b>	<ul style="list-style-type: none"> <li>• Too many payments from too many customers arrive late because the invoices went out late.</li> <li>• Creating a current report about outstanding payments is not always possible, so it becomes hard to track payments.</li> </ul>
<b>Purchasing manager</b>	<ul style="list-style-type: none"> <li>• Items are not always available from the suppliers when they are needed the most. Sometimes, ad-hoc purchasing to avoid a shortage results in unfavorable terms.</li> <li>• Purchasing may be below, above, and occasionally at the level of demand, resulting in expensive shortages and underages.</li> <li>• Purchasing managers need to rely on projections from past business activity, but the data available to them is not entirely dependable or comprehensive.</li> </ul>
<b>Warehouse manager, inventory manager</b>	<ul style="list-style-type: none"> <li>• There is dead inventory in the warehouse, but, given the lack of data, one cannot be entirely sure. Other items turn over more quickly than stock replenishment can fill, resulting in shortages.</li> <li>• Inventory data, pick lists, and picking activities are not always accurate. Picking routes are ineffective and cause workers to spend far more time than necessary.</li> <li>• Inventory management is unable to respond rapidly to changes in manufacturing and production processes. It takes too much time to make item substitutions or find other resources.</li> <li>• The warehouse always has what seems to be a high number of workers on shift, even during the night.</li> <li>• Reconciling and combining inventory reports from several warehouses is a formidable task.</li> </ul>

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<b>Shipping manager</b>	<ul style="list-style-type: none"><li>• Shipping costs are prohibitive, decreasing the company's profits. Terms with shipping companies are not optimal.</li><li>• The company does not always honor shipping commitments, resulting in customer dissatisfaction. Sometimes, a service representative gives a customer shipping information that is not correct.</li><li>• Splitting an order into separate shipments to separate locations, drop-shipping, consolidating orders, and other customer requests are difficult to accommodate.</li></ul>
<b>Director, quality assurance manager</b>	<ul style="list-style-type: none"><li>• Quality assurance reporting takes significant time and effort, especially when quality assurance workers need to document and demonstrate quality issues to suppliers.</li><li>• When a quality assurance worker needs to request a change in the production process, it takes too much time to implement the change, resulting in inferior products or temporarily stalled production.</li></ul>

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