Crestwood Associates
ERP Solution Experts

The Modernization Decision Toolkit

Three working tools to take the workshop framework back to your team and make the call with clarity.

LEG 1
Platform
The system you choose

LEG 2
Partner
The team that guides you

LEG 3
People
Your readiness to carry it

WHAT'S INSIDE

1. Modernization Decision Framework Worksheet
2. Executive Discussion Guide
3. ERP & Implementation Partner Evaluation Checklist

TOOL 1 OF 3

Modernization Decision Framework Worksheet

The modernization decision rests on three legs. This worksheet is yours. Work through it after the session, on your own or with your team, and write what is true, not what you wish were true.

Be honest as you fill this in. The worksheet is only useful if the input is accurate. If you have to ask whether a workaround counts, it counts. Write it down.

LEG 1 Platform: the system you choose

Question 1. Is your current platform the problem?

For each area, write where it stands in your operation today. Plain language. One or two lines.

Workflow

Do your processes run through the system, or around it?

Financial visibility

Can you trust the numbers without manual cleanup?

Operational intelligence

Does the team have the data they need, when and where they need it?

System connectivity

Do your tools share data automatically, or force manual handoffs?

Growth readiness

Will the system scale with where the business is going in the next three years?

Question 2. How would you judge a new platform?

The four-point fit test. Use it on any platform you evaluate. Note what you would need to see to answer yes.

1 **Does it run your workflow?**

Proven in a tailored demo on your real processes. Not a feature checklist, not the happy path.

2 **Does it bend without breaking?**

Most needs met by configuration, not custom code. Updates that do not shatter your setup.

3 **What does it really cost to own?**

Three to five years, all in. License, implementation, integration, infrastructure, upgrades, labor.

4 **Will it keep itself current?**

Continuous updates, not painful version upgrades. So you never end up in a legacy system again.

LEG 2 Partner: the team that guides you

Watch for the four red flags.

Check any you have already seen in a partner you are considering.

- ☐ **Prices the project before they understand your business.** A quote before discovery is a transaction, not a commitment.
- ☐ **Cannot tell you what is delivered at each phase.** A real partner shows you the deliverables, phase by phase.
- ☐ **Will not give you references.** You want to talk to companies your size, in your industry, running the system.
- ☐ **Only shows the clean, happy-path demo.** A real partner asks to see your actual, messy workflow.

Notes on the partners you are evaluating:

LEG 3 People: your readiness to carry it

What readiness actually takes.

Check the ones your organization is set up for today. The unchecked boxes are your risk.

- [ ] **A named change agent.** One person who owns the outcome inside your walls.
- [ ] **Decision-maker SMEs, not observers.** And more than one, so testing never depends on a single person.
- [ ] **Real testing time, reserved.** Not squeezed around the day job.
- [ ] **Education before discovery.** So your team knows what to ask for.
- [ ] **A calendar that avoids your peak season.** Do not go live when the business can least absorb it.
- [ ] **A clear line between "built it" and "ready."** Technical completion is not the same as people ready.

Your change agent. Name the one person who will own this:

AI The lens across all three legs

AI is not a fourth leg. It runs through all three. Three honest questions, and the honest answer matters more than an impressive one.

1. What AI is already built into a modern platform?

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2. What would you connect for a specific workflow?

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3. What would have to be custom-built, because your need is genuinely unique?

> **The honest part.** Not every workflow is a good fit for AI. Anyone who tells you to put AI on everything is selling something. Find the specific places it genuinely helps, do those well, and leave the rest alone.

FINISH What's slowing you down

Look back across everything you wrote. Name the two or three things costing you the most right now. These are where a modernization decision starts.

Of the three legs (Platform, Partner, People), which feels least solid for you today?

What to do with this.

Take these into the Executive Discussion Guide on the next pages, and align your leadership team before you evaluate a single platform or partner.

TOOL 2 OF 3

Executive Discussion Guide

Modernization fails when the leadership team is quietly solving different problems. Use this guide to get your leaders aligned before you evaluate a single platform or partner.

Run this as a 60 to 90 minute working conversation with the people who own the decision. The goal is not to pick software. It is to agree, out loud, on what you are solving and who owns it.

Before you begin: who should be in the room.

The owner or CEO, who carries growth and risk. The CFO or finance leader, who carries the numbers. The COO or operations leader, who carries throughput and visibility. If IT owns the systems, include them. Keep the group small enough that everyone speaks.

ROUND ONE

Do we agree there is a problem?

Each leader answers in turn, before anyone debates. Surface it, do not solve it yet.

1. Where does our current system create workarounds your team has learned to live with?
2. Where are those workarounds showing up in our numbers, our reporting, or our decisions?
3. What has each of us privately worried about, that we have not said out loud as a team?

ROUND TWO

What are we actually solving?

The most expensive mistake is two leaders solving two different problems. Converge here.

1. If we fixed only one thing in the next twelve months, what would deliver the most value?
2. Is this a process problem, a system problem, or both? What evidence says so?
3. What does a good outcome look like, in plain terms, a year from now?

ROUND THREE

The three legs: where does our risk live?

Walk each leg. Name the one that feels least solid before you commit to anything.

Platform

1. Is our current platform the constraint, or are we working around process gaps?
2. If we evaluated a new platform, would we judge it on a tailored demo of our real workflow, or a feature list?
3. Have we ever priced what the current system costs us, in hours and delay, over a full year?

Partner

1. What would disqualify a partner for us, and have we agreed on it as a team?
2. Who here has been through an implementation before, and what did the partner get right or wrong?

People

1. Do we have the bandwidth, the SMEs, and the decision-making capacity to carry a change like this?
2. Who, by name, would own this internally? Is that person set up to succeed?
3. When is our peak season, and what timeline would protect the business?

ROUND FOUR

Alignment and ownership

Close the conversation by writing down what you agreed. If you cannot fill these lines, you are not aligned yet.

The problem we agree we are solving:

The leg most at risk for us right now:

Our next step, and who owns it:

When we will revisit this as a team:

TOOL 3 OF 3

ERP & Implementation Partner Evaluation Checklist

The platform rarely decides whether a modernization succeeds. The partner often does. Use this checklist when you evaluate implementation partners, before you sign anything.

A failed implementation almost never traces to the software category. It traces to a partner who did not understand the business, or a process nobody mapped. This checklist is how you measure the partner leg.

WATCH FOR Four red flags

- **They price before they understand you.** A number before real discovery means they are selling a transaction, not committing to your outcome.
- **They cannot name what is delivered, phase by phase.** If they cannot tell you what done looks like at each stage, they cannot be held to it.
- **They will not give references.** A confident partner connects you with companies your size, in your industry, running the system today.
- **They only ever show the happy-path demo.** If they never ask to see your messy, real workflow, they are not testing fit. They are performing.

LOOK FOR What a real partner does

- **Discovery before pricing.** They learn the business first, then scope and price against what they found.
- **A tailored, day-in-the-life demo.** Your real workflows, your scenarios, configured. Not a generic product tour.
- **Clear deliverables at every phase.** You always know what is being delivered, and what done means.
- **Industry knowledge, not just software knowledge.** They speak your operation, not only their product.
- **An in-house team, end to end.** The people who sell it also implement and support it. No handoffs to strangers.
- **The integrity to tell you when you are not a fit.** A partner who will walk away from the wrong project is one you can trust with the right one.

COMPARE Partner evaluation scorecard

Mark each partner you are evaluating: a check for met, a dash for unsure, a cross for not met.

Criterion	Partner A name	Partner B name	Partner C name
Did discovery before quoting a price			
Showed a tailored demo on our real workflow			
Named deliverables clearly at each phase			
Provided references in our industry and size			
Demonstrated real knowledge of our industry			
Uses an in-house team to sell, implement, support			
Has a clear plan for our people and change management			

ASK Questions to put to a prospective partner

1. Walk me through your discovery process. What do you need to learn before you can scope this?
2. What exactly is delivered at each phase, and how do we know a phase is done?
3. Can we speak with two clients your firm implemented who are our size and industry?
4. Will the people in this room implement and support the project, or does it hand off?
5. Show us how the system handles this specific workflow of ours, including the exceptions.
6. When have you told a prospect they were not a fit, and why?
7. What do you need from our team and our schedule for this to succeed?

THE NEXT STEP

Watch the session this toolkit came from.

The toolkit puts the framework in your hands. The workshop shows Platform, Partner, and People applied to a real modernization decision, with finance and operations leaders working through the same questions. Sixty minutes.

No pitch. No sales call. Watch the session.

Watch when it works for you.

Watch the Replay

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About Crestwood Associates

Crestwood Associates is a leading mid-market ERP advisory and implementation firm. For more than 27 years, across 5,000-plus implementations, we have helped manufacturers, distributors, construction, and professional-services companies move off legacy systems and onto platforms built to scale. We sell, implement, and support with an in-house team, end to end. No handoffs, no hidden fees.

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