

Technology Efficiency Checklist



Are You Getting the Most Out of Your System?

Every day, CEOs, CFOs, and operations leaders are responsible for decisions that shape their business, from reviewing routine financials and operational insights to pursuing growth opportunities and launching large-scale initiatives. When the stakes are high, the data and processes behind those decisions need to be correct and up to date.

For many small to midsize businesses, technological inefficiency quietly erodes that foundation, leading to lost revenue, customer disappointment, and broken workflows. With full visibility into every facet of your business, you can make smarter decisions, move faster, and grow with confidence.

Use this checklist to assess whether your tech stack is configured, adopted, and connected the way it needs to be. Check every item your team has confidently in place and gain a deeper insight into your current efficiency and identify areas for growth.



System Configuration



Data Quality



User Adoption



Integrations & Automation



Reporting & Visibility





System Configuration

Are your core workflows configured to match how your team actually operates?	☐
Is your financial structure set up to produce meaningful, decision-ready reports your leadership team needs?	☐
Can employees access exactly the information they need without exposing sensitive data?	☐
Do key transactions route through automated approval workflows?	☐
Has your system been reviewed and updated since your last go-live?	☐



Data Quality & Integrity

Is your master data clean, consistent, and free of duplicates?	☐
Do you trust the accuracy of the financial data you're basing decisions on?	☐
Does your organization have a process for maintaining data quality over time?	☐
Is data being segmented, with inactive records managed separately from active records?	☐
Are all departments updating data within a single platform, spreadsheet, or dashboard?	☐



User Adoption & Training

Are employees actively using your system as intended?	☐
Do new-hires receive proper training before accessing the system?	☐
Are usage patterns reviewed consistently with low-activity users identified?	☐
Do users know where to go for system support and questions?	☐
Is process documentation current and accessible to the entire team?	☐
Are critical processes documented so the business isn't dependent on a single employee?	☐





Integrations and Automation

Is your current technology connected to other core platforms your business relies on?	☐
Are repetitive, manual tasks minimized through automation across your core platforms?	☐
Do you have exception alerts and threshold notifications set up and active?	☐
Are your financial tools integrated to reduce manual reconciliation?	☐
Are your integrations monitored for errors or sync failures to ensure data remains up-to-date?	☐
Could your business double in size without adding administrative headcount?	☐



Reporting & Visibility

Do executives have access to live dashboards for decision making and data retrieval?	☐
Are KPIs tracked within the system rather than in separate spreadsheets?	☐
Can department heads pull the reports they need without going through a separate department?	☐
Does your reporting support the full complexity of your business structure?	☐
Can you close your books within 5 business days?	☐
Can you see profitability by customer, product line, and location?	☐



How Did You Score?

0-6 Checks

Action Needed

You're not getting the most out of your system, and it's costing more than it's delivering.

Let's talk.

7-12 Checks

Underutilized

You have a foundation, but gaps in key areas are likely creating workarounds and missed opportunities.

Let's talk.

13-19 Checks

Room to Grow

You have a solid foundation. Targeted improvements in a few key areas could significantly lift performance and efficiency.

20-25 Checks

Highly Efficient

You're getting real value from your investment. The next step is making sure it scales with your growth.

Ready to Get the Most Out of Your System?

Regardless of whether your responses indicated that you are maximizing your system, one truth stands out: there is always potential for growth. By implementing a comprehensive ERP system that offers updated insights and real-time data, you will gain a strategic advantage to enhance your operations and make informed decisions to expand your business.

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