The Ultimate Guide to Choosing the Right ERP Inventory Software

A Practical Guide to Assessing What Your Manufacturing Operation Needs



The most useful ERP requirements come from a clear picture of how your operation works today and how you want it to work in the future. By examining your current processes, you can define what you want a new ERP to accomplish and determine which capabilities will support those goals.

This guide provides a practical framework for building those requirements. In the following pages, you'll learn how to assess where you're at, establish meaningful objectives, map the workflows your ERP needs to support, and turn what you learn into clear evaluation criteria.

Let's get started.



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Pinpoint Where Your Operations Are Falling Short

Begin your ERP assessment by looking closely at how work gets done today. Consider which processes serve your team well and where a more connected system could make work easier or more efficient.

Where Could Your Team Save Time?

As your business grows, processes often evolve around the capabilities of existing systems. Your team may use spreadsheets, manual steps, or other supporting processes to keep information flowing and work moving. Revisit those processes and determine where a more connected system could save time.

- Identify repetitive work that could be simplified or automated.
- Look for opportunities to reduce duplicate data entry.
- Review processes that rely on spreadsheets or separate records.
- Identify information employees regularly spend time locating.
- Prioritize opportunities that could return meaningful time to your team.

Where Could You Improve Visibility?

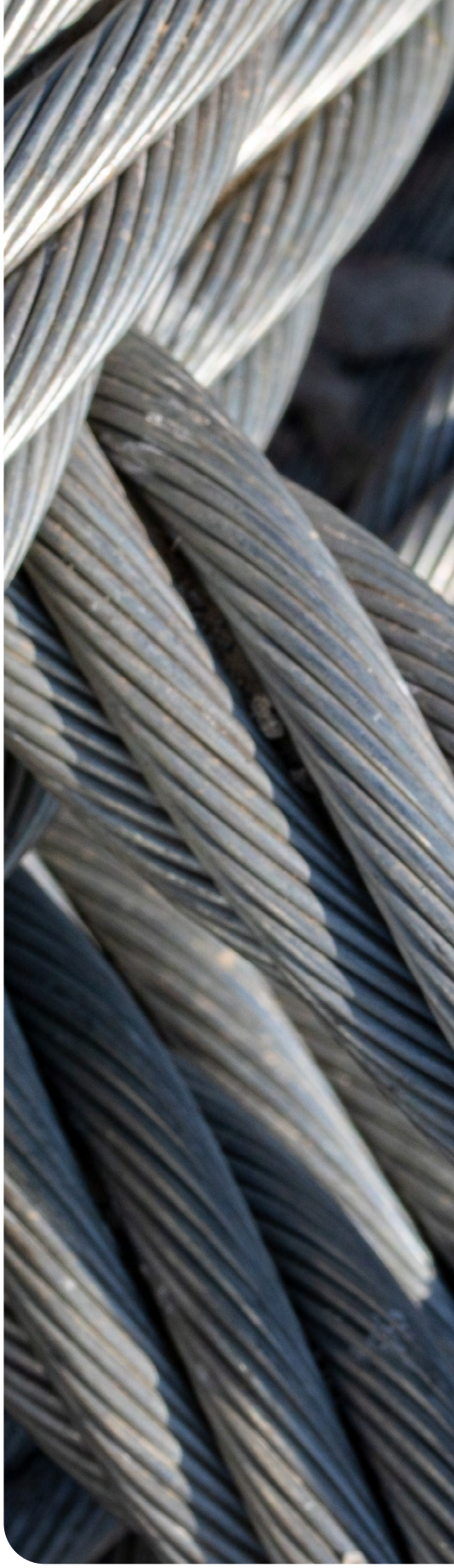
Better visibility starts with understanding what information your employees need to make decisions. Consider where better visibility could help employees act faster or coordinate more effectively.

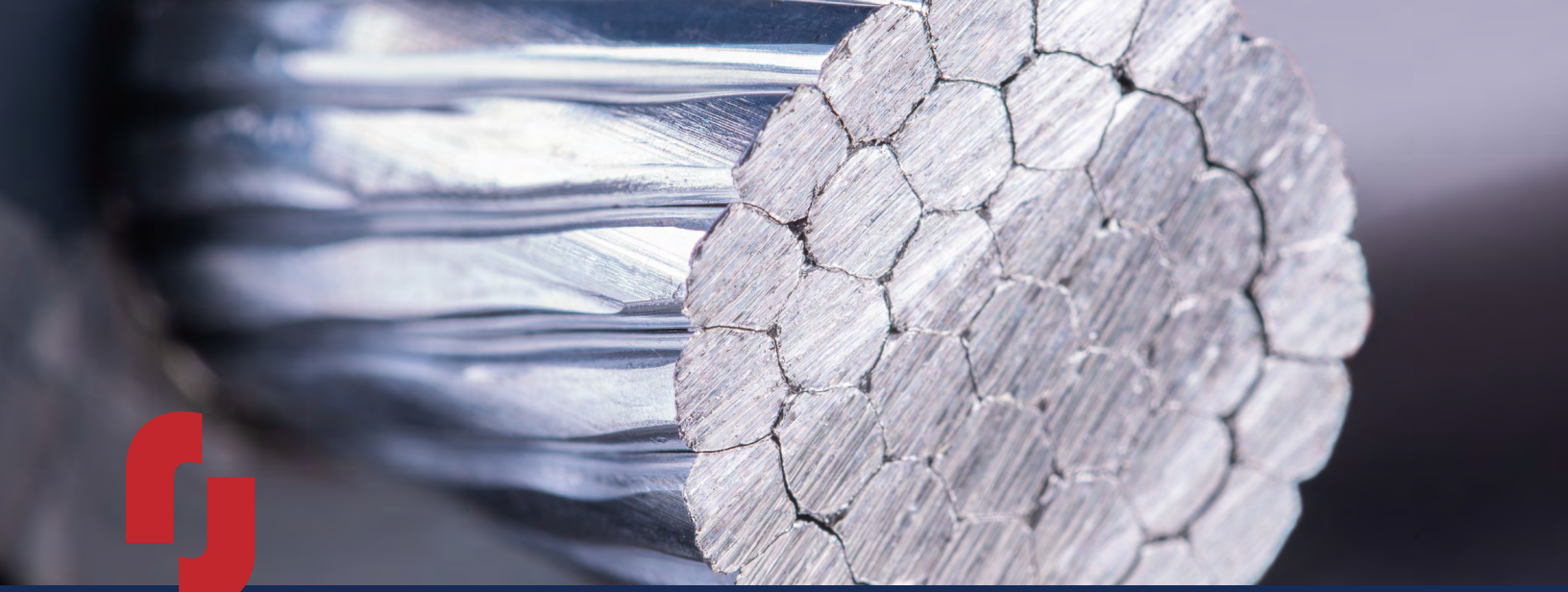
- Review the inventory information employees rely on each day.
- Assess visibility into WIP and current production activity.
- Identify where more timely order status would be valuable.
- Review reports that require manual preparation.
- Determine where shared information could improve coordination.

Where Could Processes Move More Smoothly?

Pay particular attention to the points where work moves between people, departments, or systems. These handoffs can reveal opportunities to simplify how information follows a process. Understanding them can also help you identify ERP requirements that improve continuity as work moves from one stage to the next.

- Identify recurring activities that create unnecessary rework.
- Review handoffs that require employees to verify information.
- Look for opportunities to connect information between processes.
- Identify transactions that could be captured more promptly.
- Prioritize improvements based on their value to the operation.





Establish What the Business Needs to Achieve

Once you understand where opportunities exist, define the outcomes you want the new ERP to support. Clear outcomes give your team a shared destination and provide a practical standard for determining which capabilities deserve the most attention.

What Needs to Improve?

For each opportunity you identified, describe the result you want. Make that result specific enough to evaluate later. For example, rather than setting a broad goal of improving inventory visibility, define what employees should be able to see and how that information should help them make better decisions.

- Connect each objective to an opportunity identified in Chapter 1.
- Define how the improved process should work.
- Focus on operational outcomes rather than individual features.
- Identify improvements that would benefit multiple departments.
- Prioritize objectives according to their value to the business.

What Should You Be Able to Measure?

Measurable objectives give your ERP project a clearer definition of success. Choose measures that reflect the operational improvements you're pursuing, then establish a baseline where reliable information is available. These measures can also help you determine what information the new ERP should make easier for your team to monitor.

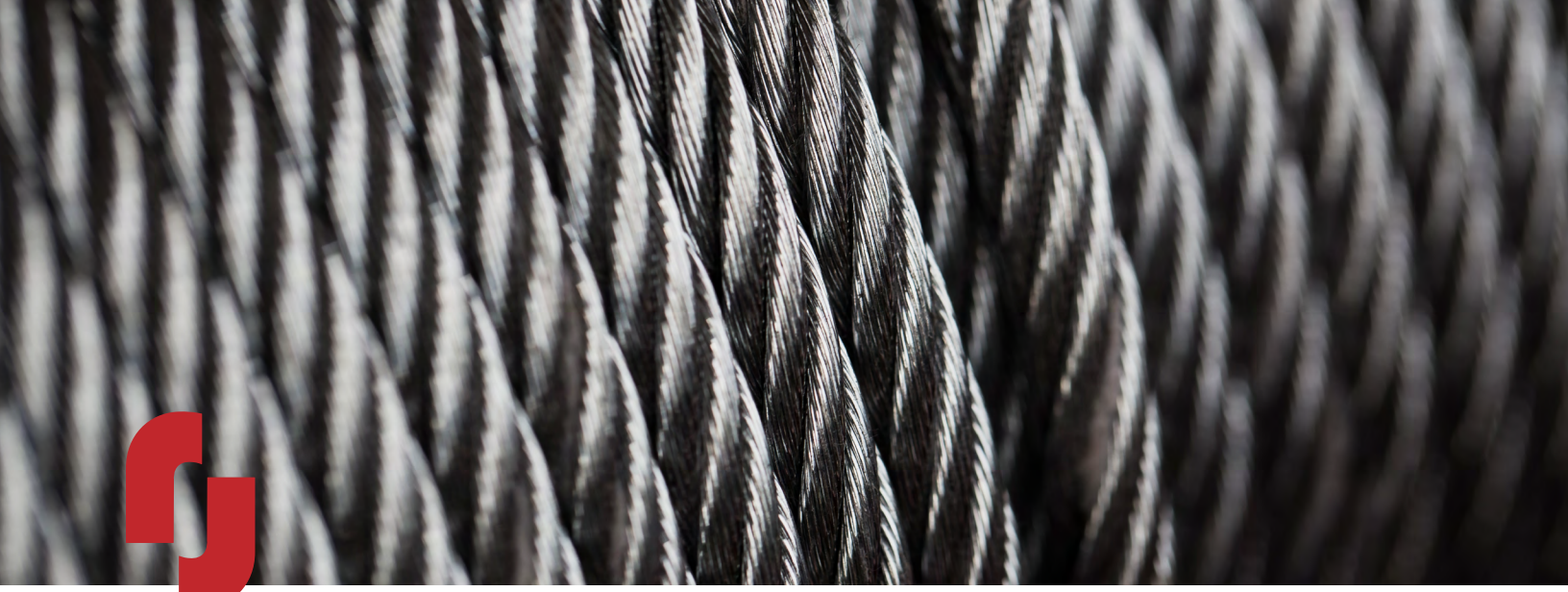
- Establish indicators for your highest-priority objectives.
- Consider metrics related to inventory, production, costs, margins, and fulfillment.
- Determine what information leadership needs to evaluate performance.

What Will Your Business Need in the Future?

Your requirements should support the business you operate today without losing sight of the operation you are building. Consider how expected growth could place new demands on existing processes, and identify where additional scale or complexity may change what your team needs from its ERP.

- Consider anticipated changes in volume, products, locations, or operational complexity.
- Identify processes likely to become more difficult as the business grows.
- Define needs based on both current operations and future demands.





Map How Work Moves Across Your Organization

ERP requirements become more useful when they reflect complete workflows rather than isolated departmental needs. Map those workflows so you can see how information needs to move as work progresses through the organization.

How Does Work Move From Order to Fulfillment?

Choose a representative order and follow it through your operation. At each stage, document what happens and what information the system needs to capture. This gives you a clearer view of how transactions connect and what employees need from the ERP as an order moves toward fulfillment.

- Trace the workflow from quote or order through fulfillment.
- Document important activities along the way.
- Note when information needs to move between departments.
- Document supporting processes that currently occur outside the ERP.

Which Processes Are Unique to Your Operation?

Standard ERP functionality may cover many common business processes, but specialized operations require specialized features. These details can become key differentiators as you evaluate ERP solutions.

- Identify workflows specific to your products, materials, customers, or industry.
- Document specialized requirements such as lot tracking, WIP, costing, or quality controls.
- Distinguish processes that must be preserved from those that should be improved.



Where Could Your Processes Be Better Connected?

Review how information moves from one team to the next. If employees have to recreate information or confirm it outside the system, there may be an opportunity to strengthen connections between processes. Identify gaps between sales, purchasing, inventory, production, and finance.

- Examine where teams maintain separate records or enter the same information multiple times.
- Determine where stronger connections could improve accuracy and visibility.



Translate Business Needs Into ERP Capabilities

Rather than starting with a standard software checklist, use what you have learned about your operation as the basis for your ERP requirements. This approach gives you a more meaningful way to compare ERP solutions by keeping individual capabilities connected to a business purpose.

Start With the Business Need, Not the Feature

For each requirement, determine what the ERP must enable to achieve a specific goal. This creates a clear connection between business outcomes and functionality. It also gives vendors a real-world scenario to walk through during a demonstration.

- Connect each operational challenge to the outcome the ERP needs to support.
- Determine whether the need relates to visibility, efficiency, accuracy, control, traceability, or profitability.
- Use those outcomes to identify relevant ERP functionality instead of starting with a generic feature checklist.

Understand How Rubicon's Capabilities Can Support Your Requirements

Rubicon ERP is designed around the operational requirements of wire and cable and wire rope manufacturers and distributors. Its capabilities support inventory control and real-time transaction processing while helping businesses maintain the traceability and visibility needed to manage complex operations.

Here are some ways Rubicon can help your business achieve its goals:

- Inventory and traceability: Inventory control, lot and serial traceability, WIP tracking, location management, and specialized material tracking to improve visibility throughout the operation.
- Purchasing and costing: Demand planning, reorder points, landed and commodity costing, yield and scrap analysis, and profitability insights to strengthen purchasing and cost control.
- Operations, sales, and quality: Production management, quoting and orders, reporting, quality control, testing records, certifications, and compliance documentation within the ERP.

Build Your ERP Requirements Around Your Operation

Once you have identified the capabilities your operation needs, organize them by importance. Some requirements will be essential to daily operations, while others may simply be convenient. Establishing those distinctions will make it easier to compare solutions without giving every feature equal weight.

- Separate must-have capabilities from functionality that provides additional value.
- Account for specialized requirements created by your products, materials, customers, and industry.
- Prioritize capabilities according to the operational problems they solve and their impact across the business.







Create a Shared Definition of What Your ERP Must Support

The final step is to bring individual departmental needs into an organization-wide framework. Each team has a different perspective that can reveal what might otherwise be overlooked.

Who Needs to Be Part of the Assessment?

Include people who understand how work is performed today as well as those responsible for where the business is going. Daily users can provide detailed insight into processes, while managers can identify cross-team dependencies. Leadership can help connect those needs to the broader objectives behind the ERP investment.

- Involve employees who perform key processes every day.
- Include managers who understand cross-department workflows.
- Capture leadership's objectives for the ERP investment.

Where Do Departmental Priorities Overlap?

Departments may describe their needs differently, even when they would benefit from the same underlying improvement. Identifying these shared needs can help you find requirements with broader operational value.

- Group requirements that support the same business objective.
- Identify information needed by multiple departments.
- Evaluate competing requests against agreed business objectives.
- Prioritize capabilities that create value across the organization.

What Does Your Final ERP Requirements Framework Look Like?

Bring your findings together in a framework that connects each requirement to a defined business need. You want a practical tool your team can use to evaluate how well each solution supports the processes and outcomes that matter to your operation.

- Consolidate the opportunities identified during your assessment.
- Define the desired outcome for each priority area.
- Document the ERP capabilities needed to support that outcome.
- Assign a priority to each requirement.
- Identify the workflows and teams each requirement affects.
- Create realistic scenarios for vendors to demonstrate.





Turn Your ERP Requirements Into the Right Solution

By assessing your current operation, you can identify opportunities to make work more efficient and information more accessible. Defining the outcomes you want gives those opportunities direction, while mapping your workflows shows how the ERP needs to support work as it moves across the organization. Together, those findings create a requirements framework grounded in your business.

They also give you a more practical way to evaluate vendors. Instead of asking whether a system offers a particular feature, you can ask the vendor to demonstrate how the software supports a process that matters to your operation. This lets your team evaluate ERP options by how they work in practice, not just which features they have.

Rubicon ERP is purpose-built for specialized manufacturers and distributors, with a focus on inventory control, real-time transaction processing, traceability, and flexible workflows. Our goal is to give you an ERP that supports the way your operation works and adapts as your requirements evolve.

Ready to see how Rubicon can support your organization? Schedule an ERP software demo to speak with an advisor about your operation.

the rubicon group

An ERP Built for You



www.**rubgrp**.com