

The ERP Needs Assessment Checklist

There's no one-size-fits-all ERP system. To find the solution that's right for your campus, you must first understand your institution's specific challenges and needs. You can uncover these by performing a needs assessment. Below is a basic checklist to get you started.

Step 1. Involve Stakeholders

- Identify key stakeholders (module managers, department heads, etc.).
- Solicit input from faculty, staff, and students.

Step 2. Define Your Requirements

- Analyze current processes and identify areas for improvement.
- List out the specific things you need your ERP to do.

Step 3. Consider the Type of ERP That You Want

- Higher education ERP vs. industry-agnostic ERP
- Single-vendor ERP vs. best-of-breed ERP
- Cloud ERP vs. on-premises ERP

Step 4: Identify Important Systems You Want to Access

Generally, an ERP system incorporates student, financial, and HCM solutions, but you can add on modules to enhance campus operations and improve user and student experiences.

- Analytics and Reporting:** Turn complex information into insights and generate easy-to-understand reports to support data-driven decision-making.
- Advancement:** Manage alumni databases, fundraising programs, campaign progress, and more within your holistic ERP.
- Communications:** Leverage built-in communications capabilities to maximize engagement across campus and improve collaboration between departments.
- Financial Aid:** Access financial aid tools to improve how you deliver and communicate financial aid offers to students.
- Learning Management System:** Incorporate your LMS into your ERP to simplify how you manage courses, gradebooks, tests, and more.
- Retention:** Leverage predictive analytics and early alert systems to improve student outcomes, enable quick interventions, and boost persistence.
- Constituent Relationship Management (CRM) System:** Manage student recruitment and outreach, simplify the application process, and nurture learners from prospect and onwards.
- Non-Traditional Program Management:** Manage your continuing education programs, non-credit enrollments, alternative credentials, etc.
- Workflow Management:** Give staff the power to automate processes to improve productivity, enhance collaboration, and deliver better student experiences.



Scan the QR code for more information.

Step 5. Plan Your Budget and Implementation Timeline

- Get implementation timelines from peers who use prospective vendors.
- Define your ideal on-time, on-budget implementation.
- Make sure you understand the implementation process, including data conversion, onboarding, and training.

Step 6. Define Desired Outcomes

Not all ERP systems are created equal. When deciding on an ERP system, you may have to compromise on outcomes that are "must haves" vs. those that are "nice to have."

Examples

Must Haves	Nice-to-Haves
<ul style="list-style-type: none">• Informed decision-making• Streamlined enrollment process• Access to real-time data• Improved cost control	<ul style="list-style-type: none">• Streamlined workflows• Reduced administrative burdens• Improved collaboration• Enhanced mobile experiences

We've compiled a list of potential outcomes below, but your institution may have different desired results.

- Streamlined workflows
- Improved communications
- Robust reporting
- Streamlined enrollment process
- Personalized student services
- Enhanced mobile experiences
- Reduced costs
- Enhanced scalability
- Enhanced data security
- Improved student retention



Scan the QR code for more information.