

**ERP + AI**

**Business Case**



# CURRENT PAIN POINTS



## Objective:

Identify and describe the key operational, financial, and strategic challenges currently faced by the organization.



## GUIDING PROMPTS:

- ➔ What inefficiencies exist in current processes (manual work, data silos, outdated systems)?
- ➔ How do these issues impact productivity, cost, and decision-making?
- ➔ Which departments or functions are most affected?

## EXAMPLE FORMAT:

Pain Point	Description	Impact (Cost, Time, Risk)
Manual data entry across systems	Duplicate work and errors	High labor cost, delayed reporting
Limited visibility into financial performance	Data scattered across tools	Slow decision-making, missed opportunities

# RISKS OF DOING NOTHING



## Objective:

Outline the potential consequences of maintaining the status quo.



## GUIDING PROMPTS:

- ➔ What operational or financial risks increase if no action is taken?
- ➔ How might competitors gain an advantage?
- ➔ What is the potential cost of inaction over 1–3 years?

## EXAMPLE FORMAT:

Risk	Description	Estimated Impact
Continued inefficiency	Manual processes remain	\$X in lost productivity annually
Data inaccuracy	Errors in reporting	Compliance and audit risks

# PROPOSED ERP + AI SOLUTION



## Objective:

Present the recommended ERP + AI solution and its strategic fit.



## GUIDING PROMPTS:

- ➔ What ERP platform and AI capabilities are being proposed?
- ➔ How will the solution address the identified pain points?
- ➔ What are the key features and differentiators?

## EXAMPLE FORMAT:

Component	Description	Expected Benefit
ERP Integration	Unified financial and operational data	Real-time visibility
AI Forecasting	Predictive analytics for demand and cash flow	Improved accuracy and planning
Automation Tools	AI-driven workflows	Reduced manual effort

# EXPECTED ROI & EFFICIENCY GAINS



## Objective:

Quantify the financial and operational benefits of the proposed solution.



## GUIDING PROMPTS:

- ➔ What cost savings, revenue growth, or efficiency improvements are expected?
- ➔ What is the projected payback period?
- ➔ How will success be measured (KPIs)?

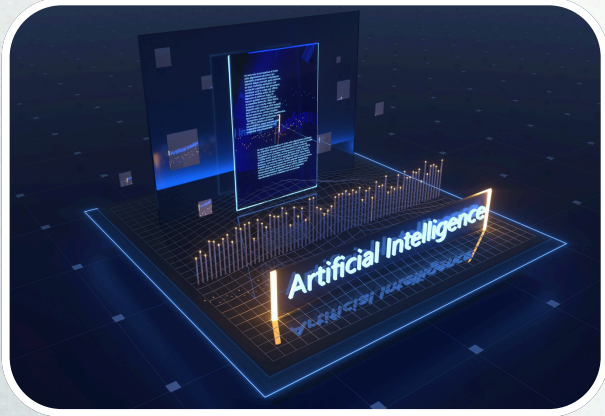
## EXAMPLE FORMAT:

Metric	Current State	Projected State (Post-Implementation)	Improvement
Monthly close time	10 days	3 days	70% faster
Manual data entry hours	500 hrs/month	100 hrs/month	80% reduction
Forecast accuracy	65%	90%	25% improvement

## ROI SUMMARY:

- Total Investment: \$[Amount]
- Annual Savings: \$[Amount]
- Payback Period: [X months/years]

# IMPLEMENTATION ROADMAP



## Objective:

Provide a high-level timeline and key milestones for deployment.



## GUIDING PROMPTS:

- ➔ What are the major phases of implementation?
- ➔ Who are the key stakeholders and responsible teams?
- ➔ What dependencies or risks exist?

## EXAMPLE FORMAT:

Phase	Timeline	Key Activities	Owner
Phase 1: Discovery & Planning	Month 1-2	Requirements gathering, vendor selection	CFO, IT Lead
Phase 2: System Configuration	Month 3-5	ERP setup, AI model training	Implementation Partner
Phase 3: Testing & Training	Month 6-7	User testing, staff training	Operations Team
Phase 4: Go-Live & Optimization	Month 8-9	System launch, performance tracking	Project Manager

# ERP + AI

## Business Case

