

ERP Coffee Break Starter Sheet

7 questions to ask before you touch the system

ERP issues rarely live in one field, one screen, or one team. Before changing the system, use these questions to slow the conversation down just enough to understand what is really happening.

1. What business outcome are we trying to improve?

Describe the result in business terms first. Faster order entry, fewer corrections, clearer ownership, better data quality, or something else?

2. Who touches this process?

List the people and roles involved before, during, and after the step you are looking at. ERP changes often affect someone who was not in the original conversation.

3. What happens immediately before and after?

A screen only shows one moment. Map the handoff on both sides so you can see dependencies, timing, and where information enters or leaves the process.

4. Which data drives the step?

Identify the master data, transaction data, defaults, rules, or statuses that influence what the user sees and what the system does next.

5. Where else is that data used?

Check reports, interfaces, downstream transactions, integrations, permissions, and other teams before deciding that a change is local.

6. What kind of problem is this really?

Is it a process issue, data issue, configuration issue, integration issue, usability problem, training gap, or genuine missing functionality? The answer changes the solution.

7. How will we know the change worked?

Agree on a simple success measure before implementation. If the outcome cannot be described, the requirement probably is not clear enough yet.

A useful ERP habit: define the problem before you define the solution.

A 5-Minute Change Check

Use this before a workshop, ticket, or change request

Prompt	Your note
Current situation	What happens today?
Pain point	What is difficult, slow, risky, or unclear?
Business impact	Why does it matter?
Affected people	Who works with this process or data?
Dependencies	What reports, interfaces, roles, or downstream steps may be affected?
Desired outcome	What should be better after the change?
Evidence of success	How will we know it worked?

Keep this sheet beside your keyboard, bring it into workshops, or use it before raising an ERP change request.

This is a standalone companion resource created for readers of The ERP Coffee Break Series. It does not reproduce the book's quick-reference section.

Want the full thinking behind the method?

How ERP Really Works explains how people, processes, data, requirements, and system change connect in real ERP work.

Briley Braun · erpcoffeebreak.com