

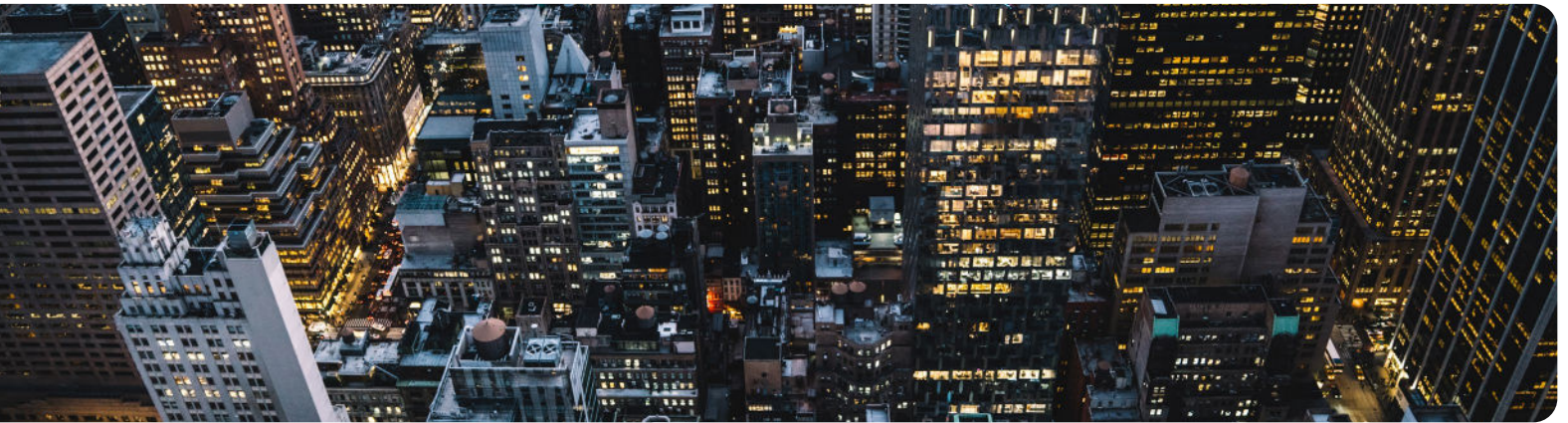


# Turn ERP into a **Boardroom Success Story**

How leadership teams connect  
ERP initiatives to execution,  
predictability, and enterprise value.



# Executive Summary



**An ERP system is one of the most important operational investments a leadership team will make. It touches nearly every core process in the enterprise and, when executed well, strengthens operational discipline, margin visibility, and working capital control.**

Yet in many boardrooms, ERP conversations quickly default to timelines, modules, and implementation milestones. When framed this way, the ERP initiative is evaluated primarily as a technology project rather than as a business performance initiative.

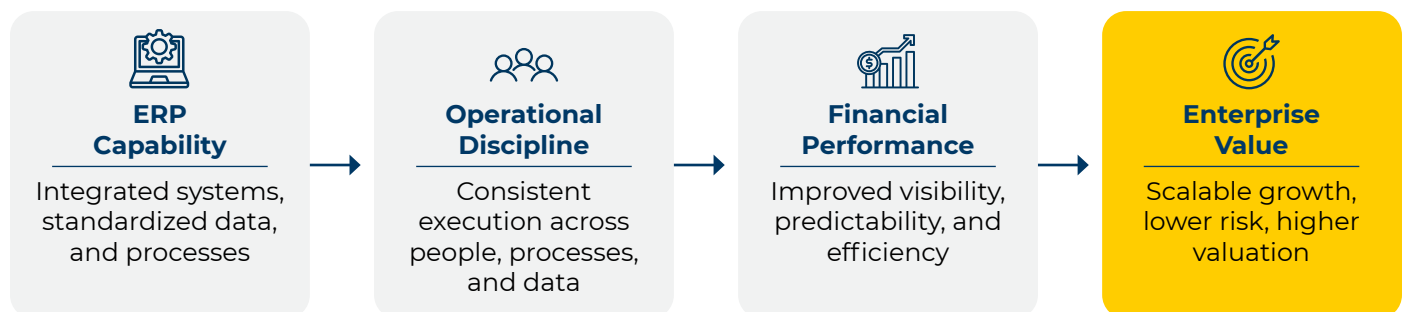
Boards are not evaluating software. They are evaluating leadership judgement, execution discipline, and the organization's ability to turn the investment into measurable business value.

#### **What boards actually want to know:**

- Will the business run better?
- Will performance become more predictable?
- Will integration and growth get easier?
- Will risk decrease?
- Will growth become easier to scale?
- Will margins and working capital improve?

## **How ERP Creates Enterprise Value**

ERP platforms create value when people adopt new ways of working, and the organization executes with discipline.



#### **ORGANIZATIONAL CHANGE MANAGEMENT**

Drives adoption, behavior change, and accountability

# ERP as an Enterprise Performance Platform

ERP platforms create value by enabling disciplined execution. Organizational change management ensures the business adopts the processes and accountability structures required for the ERP system to improve operational and financial performance.

Successful ERP programs also begin well before system implementation. Leadership teams must first define how the business should operate, including core processes, decision rights, and the operating model, before selecting and deploying an ERP platform. When this sequence is reversed, the initiative is often driven by software capabilities rather than business priorities.

When the ERP platform is positioned as a business performance platform, the ERP initiative becomes a strategic effort with measurable impact on execution, predictability, and enterprise value.

**To boards and investors, ERP systems are part of the company's execution infrastructure. The platform shapes how work flows across the organization:**

- How orders move through the business
- How inventory is managed
- How production is scheduled
- How data flows across functions
- How financial results are consolidated
- How compliance is documented

**When ERP systems are misaligned with how the business operates, the symptoms are rarely technical. They appear as:**

- Inconsistent data
- Manual workarounds
- Delayed reporting
- Forecast volatility
- Slower integration during transactions

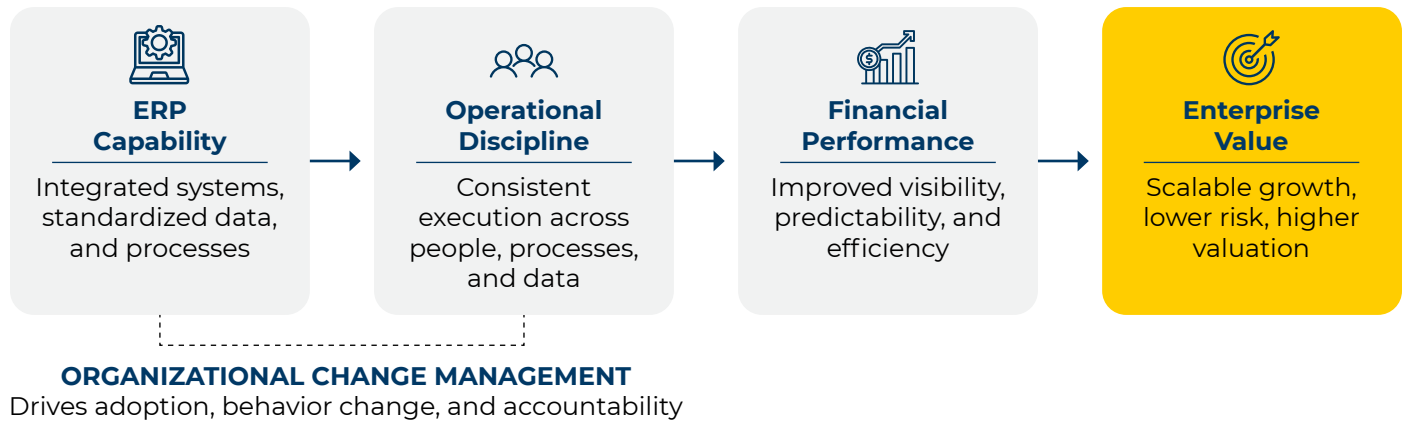
In this context, the ERP initiative must be treated as an enterprise initiative owned by leadership, not delegated as a technology program.



**With the right ERP system, 20–30% efficiency gains and 10–15% revenue growth are achievable, but only when ERP is treated as a business platform, not a software installation.”**

**James Bandy, Managing Director, TriVista**

# A Framework Boards Understand



## ERP Capability

**At its foundation, an ERP platform provides structure:**

- Standardized processes
- Defined data governance
- Integrated workflows
- Controlled system configuration
- Structured reporting

These capabilities create consistency. Consistency reduces variability. Variability is what erodes board confidence.

## Financial Stability

**Boards monitor performance through financial indicators. The ERP platform should support improvement in:**

- Margin visibility by product, customer, and channel
- Inventory accuracy and working capital management
- Clean and timely financial consolidation
- Reduced rework and error-related cost
- Improved forecasting discipline

The platform doesn't create revenue on its own. It helps leaders run the business with fewer unknowns, building habits that support steady results.

## Operating Discipline

**When ERP systems are aligned to a clear operating model, the business benefits from:**

- Fewer manual handoffs
- Reduced reconciliation work
- Clear accountability for data ownership
- Faster cross-functional decision-making
- Less dependency on tribal knowledge

These aren't technical outcomes. They're the day-to-day controls that guide how work gets done. When the platform reinforces steady, structured habits, teams perform better. Without that support, shortcuts take over.

## Enterprise Value

**Predictability and scalability are fundamental to value creation. ERP platforms contribute to enterprise value by:**

- Allowing acquisitions to integrate without destabilizing reporting
- Enabling carve-outs with structured data separation
- Reducing operational risk during periods of growth
- Supporting multi-entity and multi-site expansion
- Strengthening compliance and audit readiness

Boards aren't asking about features. They're asking if the structure can support real growth.

# Where ERP Initiatives Lose Credibility

**ERP initiatives lose momentum and board support  
=when execution discipline falls off.**

## 1. Lack of Executive Ownership

**If the ERP initiative is perceived as an IT-led initiative:**

- Functional leaders disengage
- Decisions stall
- Trade-offs are unresolved
- The board sees drift

Effective programs have a visible executive sponsor who owns business outcomes, not just system delivery.

## 2. Weak Governance

**ERP programs require:**

- Defined decision rights
- Structured program management
- Stage gates
- Transparent issue escalation

Without strong governance, complexity grows quickly. Boards see delays and overruns as a loss of leadership control, not as a natural result of technical challenges.

## 3. Underestimating Organizational Change Management

ERP transformations require more than system deployment. They require the organization to adopt new processes, responsibilities, and decision structures.

Organizational Change Management (OCM) prepares the business to operate successfully in the new ERP environment. It ensures employees understand not only how the ERP system works, but also how the business will operate differently.

**Effective OCM programs typically address:**

- Executive sponsorship and visible leadership commitment
- Redefined standard operating procedures aligned to the ERP platform
- Clear accountability for process execution and data ownership
- Training programs that prepare teams to work within the new system
- Communication plans that reinforce why changes are occurring

Without structured change management, employees often revert to legacy processes and manual workarounds. In those cases, the ERP platform may technically function, but the business does not realize its intended value. Ultimately, value realization depends on adoption.

# Where ERP Initiatives Lose Credibility (Continued)

## 4. Vendor-Driven Strategy

**Winning ERP efforts begin with a clear picture of the business's future model.** From there, technology selection becomes a structured comparison based on real needs.

- What must be standardized
- What differentiates the business
- Where flexibility is required
- What scale the organization must support

When teams rely only on current processes, they often bring outdated ways of working into the new system. A business-led, independent review typically delivers a platform that fits long-term priorities.

## 6. Cybersecurity & Compliance Considerations

Legacy systems and fragmented architectures can increase operational risk.

**Modern ERP platforms can support:**

- Stronger access controls
- Structured audit trails
- Standardized compliance reporting
- More secure integration environments

Cyber incidents and compliance lapses are no longer isolated technical events. They carry operational and reputational implications

Positioning ERP modernization as part of enterprise risk management provides appropriate context.

## 5. Exposure During M&A & Carve-Outs

ERP performance is often tested during transactions.

**Boards observe ERP capability when:**

- Integrations stall due to incompatible data structures
- Reporting becomes unstable post-close
- Carve-outs require prolonged transition support
- Cyber and compliance risks surface during diligence

Designing the ERP platform with structural flexibility, including multi-entity capability, clean data architecture, and secure connectivity, reduces integration friction and protects value capture.



**Standing still is often riskier than moving forward. Legacy systems quietly compound cost, risk, and decision latency every quarter."**

**James Bandy,  
Managing Director, TriVista**

# How to Structure the Board Conversation

ERP conversations land best when centered on business impact instead of technical progress. A solid ERP story usually covers five components.

## 1. Strategic Rationale

Clarify the current execution limits, how they shape financial results, and why now is the right moment to modernize the ERP. This keeps the work tied to real business needs instead of system timelines.

## 2. Operational Impact

Show how the business will work in a new way: less manual work, cleaner data, smoother teamwork, and quicker, clearer decisions. The more specific you are, the more trust you build.

## 3. Financial Implications

Connect ERP improvements to the board's key financial lenses: clear margins, smarter working capital use, steadier forecasts, and sharper cost visibility. Even with phased benefits, make the financial path obvious.

## 4. Governance & Accountability

Boards expect clear accountability. A strong ERP program names who owns what, including: executive sponsor, governance setup, decision authority, change leadership, and risk oversight, such as cyber and compliance.

## 5. Success Indicators

System milestones track progress, but boards look for business results. Success indicators should show clear gains across three areas:

### Operational:

- Faster process cycles
- Better inventory accuracy
- Less manual reconciliation

### Financial:

- Clearer reporting
- Smaller forecast gaps
- Stronger working capital habits

### Risk:

- Better compliance
- Clear audit trails
- Stronger cyber controls



# How Boards Ultimately Evaluate ERP

## Boards view ERP programs like any major investment: they expect clear, measurable improvement in business results.

In our experience working with executive teams and boards, ERP initiatives rarely become a strategic discussion because of system age alone.

It becomes a board-level issue when performance strain becomes visible.

- When forecasts are harder to defend
- When integration timelines extend
- When reporting requires manual intervention
- When compliance or cyber exposure increases

When performance issues are causing strain, the focus moves away from the tools and toward the engine that makes the work happen. Boards don't expect ERP systems to erase complexity, but they do expect leaders to oversee these investments with steady discipline.

## Key Performance Indicators

Area	Example KPI
Growth Readiness	Time to onboard new site/entity/acquisition
Profitability	Margin visibility by product/customer/channel
Working Capital	Inventory turns, DIO, and obsolete inventory
Execution	Order cycle time, schedule adherence, fulfillment accuracy
Finance	Days to close, forecast variance, reporting latency
Risk	Audit findings, access exceptions, segregation-of-duties issues

## The most credible ERP narratives share three characteristics:

1. They clearly define the operating constraint being addressed.
2. They connect ERP system capability to measurable operational and financial improvements.
3. They demonstrate visible executive ownership and governance.

Ultimately, boards want clarity on one question:

### When the ERP initiative succeeds, how will the business operate differently?

When leadership can answer that question clearly, ERP becomes more than a technology investment. It becomes a platform for disciplined growth, predictable performance, and enterprise value creation.

Pressure-test your ERP initiative with our Board-Level ERP Risk Checklist.

[Download the Checklist >](#)

# Schedule a Strategy Call with TriVista's ERP Experts



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## About TriVista

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The firm partners with C-suite leaders and investors to improve performance, unlock growth, and scale efficiently, with a distinct ability to connect operations and technology in real-world environments.

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