



# The A&E ERP Current-State Checklist

A practical checklist that reveals how well your current systems support project delivery, financial visibility, and your firm's performance today.

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Between rising labor costs, resource constraints, increasing project complexity, and pressure to maintain tight margins, A&E firms are navigating more operational challenges than ever.

The systems you rely on today play a critical role in how effectively you manage projects, allocate resources, track financial performance, and make strategic decisions.



# Section 1

## Project and Operational Visibility

Use this section to evaluate how effectively your current systems support project delivery, resource planning, and day-to-day operations.

### Check all that apply:

**Manual workarounds or spreadsheets still dominate operations**

Reliance on Excel, disconnected tools, or duplicate data entries limits visibility and increases risk across projects and financials.

**Limited visibility into project performance in real-time**

If project managers and leadership can't see up-to-date financials, utilization, or progress, decisions are delayed, and risks escalate.

**Resource planning is inconsistent or reactive**

Over or under-utilization, scheduling conflicts, or last-minute staffing changes indicate gaps in resource management.

**Work-in-progress (WIP) and project status are difficult to track**

When WIP, percentage complete, or earned value rely on manual updates or delayed reporting, project control suffers.

**Issues or overruns are identified too late**

Budget overruns, scope creep, or margin erosion aren't caught early enough to take corrective action.

# of checked prompts for section 1 =



## Section 2

### Data, Reporting, & Financial Insight

Use this section to assess how well your systems connect data across the firm and support timely, accurate decision-making.

#### Check all that apply:

**Systems are not fully integrated (CRM, project management, financials, etc.)**

Disconnected systems create data silos, rework, and inconsistent reporting across departments.

**Reporting is time-consuming or requires manual effort**

You rely on spreadsheets or IT support to generate reports, slowing down insights and extending the month-end close.

**Financial and project data are not aligned**

Differences between project budgets, actuals, and forecasts require reconciliation before decisions can be made.

**Revenue recognition or billing processes are complex or manual**

Managing time-and-materials, fixed-fee, or percent-complete billing creates inefficiencies or risks.

**Teams spend more time validating data than acting on it**

Time is lost reconciling numbers instead of focusing on project delivery, forecasting, and strategy.

# of checked prompts for section 2 =



## Section 3

# Scalability, Growth & System Adoption

Use this section to understand how well your systems support firm growth, change, and long-term scalability.

### Check all that apply:

**Growth (new offices, entities, or service lines) is difficult to support**

Expansion involves workarounds, customizations, or system limitations that slow down progress.

**User adoption is inconsistent across teams**

Employees rely on different tools or avoid the system altogether, reducing data quality and consistency.

**System changes are time-consuming or require heavy IT involvement**

Even small updates or process changes take longer than expected, limiting agility.

**Processes do not scale with firm complexity**

What worked for a smaller firm breaks down as project volume, staffing, and reporting needs grow.

**You rely heavily on external support for routine system updates**

Internal teams lack the flexibility or confidence to manage system changes independently.

# of checked prompts for section 3 =



# How Did You Score?

Add up the number of checkmarks across all sections to understand the current state of your operations.



## **0–5: Systems are supporting day-to-day operations**

Your current systems are handling core needs effectively. While there may be opportunities to optimize, nothing appears to be creating significant disruption today. Periodic evaluation will help ensure you stay ahead as your firm evolves.

## **6–10: Systems are starting to show strain**

Gaps are beginning to emerge across project visibility, reporting, or scalability. These issues may not feel urgent yet, but they can impact decision-making, utilization, and profitability over time.

## **11–15: Systems are limiting efficiency**

Multiple challenges are affecting your firm's operational efficiency. Limited visibility, manual processes, or lack of scalability are likely impacting project outcomes, financial performance, and leadership confidence.

## Why It Matters

**As A&E firms grow, disconnected systems and manual processes make it harder to maintain visibility across projects, people, and financials. Small inefficiencies in resource planning, reporting, or project execution can compound—leading to missed opportunities, margin erosion, and operational friction.**

**Understanding how well your systems support your firm today provides a clearer foundation for improving performance and planning for future growth.**



# Recommended Next Step

## Get a second opinion on your current systems

A short conversation with Aktion Associates can help you assess how well your current systems support project delivery, financial visibility, and firm performance, and identify where friction may exist.

This discussion is not intended to replace anything. It is designed to bring clarity through a comprehensive review, ensuring that your technology strategies align with your organization's current operations and future direction.

### Why Aktion?

Aktion Associates is a purpose-built technology partner for professional services firms navigating growth, complexity, and change. With deep expertise in project-based operations, cloud-ready ERP platforms, and a proprietary data-driven and lean implementation approach, Aktion delivers real-time visibility across projects, people, and financials while reducing risk and accelerating time to value. Beyond implementation, Aktion operates as a long-term partner—supporting organic growth, geographic expansion, and M&A activity through integrated ERP, infrastructure, and industry-aware support that drives sustained operational improvement and leadership confidence.

[Schedule Time to Meet](#)



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