



# The Construction ERP Current-State Checklist

A practical way to understand how well your current systems support project execution, service operations, and financial visibility today.

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Between labor shortages, rising material costs, service demand variability, and tightening margins, construction and service contractors are under more pressure than ever. The systems you rely on today play a critical role in how efficiently you manage jobs, dispatch teams, control costs, and maintain visibility across projects and financials.



# Section 1

## Project and Field Operations Visibility

Use this section to evaluate how effectively your current systems support project execution, field teams, and service operations.

### Check all that apply:

**Manual workarounds or spreadsheets still dominate operations**

Reliance on Excel, paper processes, or duplicate data entry creates inefficiencies and increases the risk of errors across jobs and service work.

**Limited access to real-time data in the field**

If project managers, superintendents, or service technicians can't access live job or work order data, it delays decisions and impacts responsiveness.

**Project scheduling or service dispatch is inconsistent, or reactive**

Missed timelines, inefficient routing, or last-minute scheduling changes point to gaps in planning and coordination.

**Work-in-progress (WIP), job status, or service activity is difficult to track in real time**

When updates rely on manual input or delayed reporting, visibility into job progress and service performance is limited.

**Issues, delays, or cost overruns are identified too late**

Problems are discovered after they've already impacted budgets, timelines, or customer satisfaction.

# of checked prompts for section 1 =



## Section 2

### Data, Financial Visibility, & Job Costing

Use this section to assess how well your systems connect data across projects, service operations, and accounting.

#### Check all that apply:

**Systems are not fully integrated (project management, accounting, dispatch/service tools, etc.)**

Disconnected systems create silos, duplicate entry, and inconsistent reporting across teams.

**Reporting is time-consuming and inconsistent**

You rely on spreadsheets or manual processes to generate job cost reports, service profitability, WIP schedules, or financial insights.

**Job cost and service cost data are not aligned**

Differences between estimates, committed costs, actuals, and invoices require constant reconciliation.

**Billing processes (AIA, T&M, service contracts, progress billing) are complex or manual**

Inefficient billing delays cash flow and increases the risk of errors or missed revenue.

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

Time is wasted validating numbers rather than improving job performance, managing service delivery, or forecasting.

# of checked prompts for section 2 =



## Section 3

# Scalability, Growth & System Adoption

Use this section to understand how well your systems support growth across projects, service operations, and the broader business.

### Check all that apply:

**Growth (more jobs, service volume, locations, or entities) is difficult to manage**

Expansion requires workarounds, manual processes, or system limitations slow down progress.

**User adoption is inconsistent across office, field, and service teams**

Different groups rely on different tools, reducing data accuracy and visibility.

**System changes require significant time or IT involvement**

Even small updates take longer than expected, limiting agility.

**Processes do not scale as workload and complexity increase**

What worked at a smaller scale breaks down as job volume, service calls, and workforce size grow.

**Teams rely heavily on outside support for routine system changes**

Internal teams lack the tools or confidence to manage updates efficiently.

# of checked prompts for section 3 =



# How Did You Score?

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



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

Your current systems are handling core needs effectively. There may be areas for improvement, but nothing appears to be causing major disruption right now. Periodic review can help you stay ahead as demands evolve.

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

Gaps are emerging across project visibility, service coordination, or financial reporting. These issues may not feel urgent yet, but they can slow decision-making and impact profitability over time.

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

Multiple challenges are impacting how efficiently your business runs. Manual processes, delayed visibility, or limited scalability are likely impacting job outcomes, service delivery, cash flow, and margins.

## Why It Matters

**As construction and service operations grow more complex, disconnected systems and manual processes make it harder to maintain control over jobs, service work, and financial performance. Small gaps in job costing, dispatch, reporting, or communication can compound—leading to delays, rework, missed revenue, and reduced profitability.**

**Understanding how well your systems support both project and service operations today gives you a clearer foundation for improving performance and planning for growth.**



# Recommended Next Step

## Get a second opinion on your current systems

A short conversation with Aktion can help you evaluate how your current systems support project execution, service delivery, job costing, and financial visibility—and where friction may occur.

This discussion isn't about replacing anything. It's about stepping back, comparing notes, and making sure your current systems align with how your business operates today.

### Why Aktion?

Construction leaders choose technology to reduce risk, improve visibility, and operate with confidence—not to experiment—and Aktion is built for that responsibility. With 45 years of construction specialization and more than 6,500 AEC customers, Aktion delivers ERP solutions designed for real-world complexity, supported by deep expertise in job costing, project execution, and estimating. Aktion's proprietary data driven strategy and Lean Implementation methodology reduce risk, accelerate go lives, and ensure projects are delivered on time and within budget. As a single, accountable partner, Aktion unifies ERP, data strategy, infrastructure, and industry aware support to help construction companies modernize, make better decisions, and operate with confidence long term.

[Schedule Time to Meet](#)



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