



The Mid-Market ERP System Health Playbook

A non-technical guide for
COOs and Operations Directors

*Growth starts with
what you already have*

What this playbook helps you do

- Benchmark your ERP maturity
- Spot early warning signs
- Understand the operational impact
- Prioritize your next steps
- Build a case for improvement



Level 1: Reactive mode

Indicators:

- Month-end takes more than 7 days
- Frequent integration errors
- Inventory visibility is unreliable
- Teams manage processes outside NetSuite
- Work relies on 1 or 2 internal experts

Risk Profile: High

Revenue Impact: Significant

Operational Cost: High



Level 2: Stabilized mode

Indicators:

- Some automation in place
- Reporting is predictable but still slow
- Integrations function with minor intervention
- Manual work reduced but not minimized

Risk Profile: Moderate

Revenue Impact: Hidden losses

Operational Cost: Manageable but rising



Level 3: Proactive mode

Indicators:

- Real-time reporting
- 99 percent integration uptime
- Automated workflows across sales, finance, and ops
- Leadership trusts the system for decisions
- ERP aligned with the growth plan

Risk Profile: Low

Revenue Impact: Optimized

Operational Cost: Efficient



Mini-Scorecard

Rate your company across 5 categories:

- Reporting speed
- Integration stability
- Manual work volume
- Data accuracy
- Scalability

Each category gets a score of 1, 2, or 3. A 1 is lowest, a 3 is highest. Once you have those five numbers, your lowest score identifies your ERP maturity level.

Recommended actions



If you're Level 1: Focus on stabilization

- Fix critical integration points
- Remove manual-order entry
- Tighten inventory and reconciliation flows
- Clean up NetSuite records and scripts



If you're Level 2: Build consistency

- Expand automation
- Eliminate documented workarounds
- Strengthen reporting cadence
- Ensure integration error handling is standardized



If you're Level 3: Scale with confidence

- Add forecasting capabilities
- Automate channel expansion workflows
- Prepare the system for new revenue streams
- Build continuous improvement cycles

Putting it all together

Your ERP should help you scale, not slow you down. AlturaCare gives COOs and Ops Directors a strategic partner that keeps the system healthy, stable, and aligned with growth.

Scan the QR code to see how AlturaCare supports predictable scale without adding extra headcount.

