

THE ANSWER COMPANY



Acumatica Discovery Workbook

Practical prep to make your
discovery session productive

Walk into discovery with
clarity and confidence

www.theanswerco.com

Start your Discovery with Clarity

Discovery is one of the most important steps in choosing your ERP. It isn't a single meeting or a form to fill out. It's the start of an ongoing process where we work with you to understand how your business runs today and what it needs for tomorrow.

This workbook is a simple way to prepare. Use it to jot down your goals, challenges, and a few examples of processes and systems that shape daily work. You don't need to be exhaustive or polished. Even rough notes help us make the most of our time together.

Think of this as a conversation-starter. What you capture here gives us a head start, and in discovery we'll dig deeper, asking the questions that bring hidden issues to light.

With three decades of industry experience and a sole focus on Acumatica, The Answer Company is here to connect your priorities with practical solutions.

We see discovery not just as a step in the process, but as the start of our partnership, one that ensures your ERP truly works for your people, your processes, and your goals.

What's Inside

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People and Roles for Discovery

Your team's insights are the foundation of a productive discovery session.

The best results come when we capture perspectives from the people who run the work every day — and bringing the right leaders into the room.

Talk to your People

Prompts by role:

FINANCE

- What takes the most time?
- Where do you lack visibility in your finances and the impact on decision-making?
- Which reports do you struggle to produce quickly?
- Key pain points & challenges



Tip:

Even a few quick conversations with your team will surface insights that leadership alone might miss.

FRONTLINE

- What slows you down most often in your daily work? What work would you do if these items were faster?
- Do you trust the information you're given to make decisions? If not, how do you make the decisions and what is the impact?
- Key pain point & challenges

OPS & SCM

- Where do orders get delayed?
- What processes rely most heavily on manual workarounds?
- If one could be improved, which process would make the biggest impact and what would the impact be?
- Key pain point & challenges

Who Should Be at the Discovery Session

Finance Lead:

Ops Lead:

Executive Sponsor:

Business Owner or CEO:

You can find more note-taking space on page 11.

Strategic Priorities & Goals

ERP should support your bigger vision, not just today's pain points.

Capture your direction for the next 1–3 years alongside the specific outcomes you want even if you think Acumatica is not related. These notes help our team connect your strategy with the Acumatica capabilities that matter most.

Priority/ Goal	Why it Matters	Estimated Impacts	Constraints
<i>Example: Expand into two new regions within 18 months</i>	<i>Supports growth targets and competitive positioning</i>	<i>10MM additional revenue</i>	<i>Need scalable ERP to handle multi-entity structure</i>

- Common Strategic Priorities**
- Market expansion into new regions
 - Launching new products or services
 - Scaling revenue without extra headcount
 - Improving customer experience

Key Business Challenges

Every business has challenges. The key is to name them clearly so we can connect them to the right Acumatica capabilities.

Even a short list here helps set the stage, but this is just the beginning. In discovery, our team will work with you to uncover the underlying issues that drive these challenges, the ones that aren't always obvious until we dig deeper together.

Challenge	Impact	Frequency/ Scale	Notes
<i>Example: Month-end close takes 10+ days</i>	<i>Leaders wait 2 weeks for numbers</i>	<i>Constant</i>	<i>Creates delays in forecasting and planning</i>

- Common Business Challenges:**
- Systems can't keep pace with growth
 - Teams re-keying data across silos
 - Inventory blind spots hurt service
 - Compliance is tracked manually

Core Processes & Workflows

Processes are where strategy meets reality. Walk us through one or two workflows that define your operations and show us where they break down. We'll use these snapshots as a starting point to explore where work can be streamlined or automated.

Process/Workflow	Key Steps (High Level)	Bottlenecks	Improvement Opportunities
<i>Example: Order to Cash</i>	<i>Order entry → fulfillment → invoicing</i>	<i>Data re-entry, delays in shipping</i>	<i>Automate order flow, real-time inventory visibility</i>

- Common Workflows to Consider**
- Month-End Close
 - Order to Cash
 - Procure to Pay
 - Project Billing

People & Experience

ERP impacts people as much as processes. Use this page to capture where teams feel the most friction or wasted effort. These perspectives ensure their voices shape the conversation, and we'll probe further in discovery to uncover hidden impacts.

Team/Role	Frustration with Current Tools	Impact	Opportunity for Improvement
<i>Example: AP Clerk</i>	<i>Manual data entry</i>	<i>Delays payments, creates stress</i>	<i>Automate invoice capture</i>

- Common Challenges:**
- Hours lost reconciling data
 - Low trust in reports
 - Too much admin vs. strategic work
 - Hard onboarding with outdated tools

Data & Decision-Making

Data is the backbone of Acumatica. The goal isn't just faster reporting; it's confident decision-making. This page is a quick way to highlight where data slows you down. In discovery, we'll dig deeper into how decisions can move faster with reliable, real-time information.

Key Business Decisions	Data you Rely On	Gaps/Delays	Impact
<i>Example: Inventory Replenishment</i>	<i>On Hand Stock Reports</i>	<i>Reports delayed by 2 days</i>	<i>Inconsistent across warehouses, Real-time visibility across locations</i>

- Common Examples**
- Reports take too long to compile
 - Conflicting "versions of truth"
 - Limited forecasting ability
 - Insights buried in spreadsheets

From Preparation to Discovery & Beyond

What you've captured in this workbook is a strong start. You've put real priorities, challenges, and examples on the page, and that gives us something valuable to work with. But this is only the surface.

Discovery doesn't stop when this workbook is complete or when we finish the first session together. It keeps unfolding as we ask better questions, challenge assumptions, and uncover what really drives how your business works. That's when the picture gets clear enough to make decisions with confidence.

Taking the time now pays off later. Companies that skip or rush discovery usually end up backtracking, trying to solve problems blind. When we invest in it together, you avoid those detours and set the stage for smoother implementation.

At The Answer Company, we don't see discovery as paperwork. We see it as the first step in a partnership. Our role is to go deeper with you, connect the dots, and bring our decades of industry experience and Acumatica expertise that turn insights into impact.

And if this all feels overwhelming, you're not alone. Most leaders don't know where to start and that's why we're here. Walking companies through discovery is what we do every day.

Ready to see what The Answer Company can do for you?

Book your discovery session now ↗

ERP projects succeed not because of what's written down, but because of what gets uncovered in the right conversation.

With The Answer Company guiding discovery, you'll surface the insights that matter most, and connect them with the flexibility of Acumatica to build a solution that fits your business.

Notes

