



S P E A R
M E T H O D O L O G Y

ERP



Your 30-Day ERP Rescue Plan Built Around Financial Risk

A CFO-first roadmap to stop cash bleed, de-risk delivery, and realign ERP to measurable business outcomes, fast with stakeholder buy-ins at every stage.

Executive summary

When an ERP program falters, the impact is immediate. Cash flow suffers, credibility erodes, and leadership careers are put at risk. Within a single quarter, emergency consulting spend, redundant processes, and write-offs can drain working capital. At the same time, hidden defects quietly eat into the margin. Analysts report that most ERP programs fail to meet their original business-case goals, and nearly one in four fail outright. The root causes are not technical glitches but misaligned strategies and large, all-at-once change approaches that overwhelm organizations.

Finance leaders are responding by moving away from multi-year ERP “mega projects” in favor of staged, modular changes. This creates transparency, reduces exposure, and provides a clear line of sight to ROI. The urgency is amplified by the rising costs of resilience and security, as well as the expansion of cloud portfolios, which add financial and operational complexity.

Why DCG for a rescue: You’re not buying a bus of juniors and a playbook. Our senior leadership has directed massive ERP turnarounds, bringing charismatic, high-energy, and focused leadership that restores confidence in your own decision-making and provides executive air cover with your CEO, board, or PE sponsors while we stabilize and deliver.

The good news: ERP rescue is both possible and predictable. This whitepaper introduces a structured 30-day plan designed to stop financial bleeding, de-risk delivery, and realign ERP initiatives with business priorities. Built around DCG’s proven **(SPEAR)** methodology and supported by a six-level delivery model, the plan gives CFOs and CIOs a time-boxed roadmap from rapid assessment to measurable outcomes.

What follows is a practical framework:



With a finance-first lens, this approach strikes a balance between speed and stability. Leaders can protect EBITDA while steering ERP programs back on course.

The Challenge Landscape: What's Actually Blocking ERP Value

Before any rescue plan can be effective, it must identify the real obstacles to ERP performance. These aren't just "bugs" or "bad users"; they're structural and behavioral challenges that compound financial risk and erode trust. A leadership vacuum is a hidden tax, as when no one sets the pace and priorities, spending drifts, confidence wanes, and even good work lands flat.

ERP Strategy Drift Costs Capital

Goals change, but scope doesn't; spend slides into features that don't move cash or margin.

Sunk-Cost Mindset & Spend Opacity

"We already paid for it" thinking hides burn and delays funding for high-ROI fixes.

Data Trust Collapse

Reports don't tie out, so decisions stall and credibility erodes right when you need action.

Process Variance & Policy Drift

Performing the same task in four different ways can lead to errors, increased audit risk, and failed automation.

Customization & Integration Debt

Over-customized cores and ownerless interfaces make every change break something else.

Unstable Go-lives That Extend Costly Support Indefinitely

Cliff-edge cutovers lock teams into firefighting and inflate operating costs.

Security, Compliance & Shadow Automation

Loose access and ungoverned bots increase breach/audit risk, eroding ROI.

Talent Gaps & Missing Product Ownership

Rotating vendors and unclear ownership reset priorities every week, leading to a loss of institutional knowledge.

Architecture Mismatch & Cloud Sprawl

Overlapping platforms raise total cost while making smart pivots feel "too hard."

Vendor Sprawl & Diffused Accountability

Too many partners, unclear RACIs—decisions are slow, and finger-pointing replaces fixes.

UAT as a Box-Check (Not a Learning Loop)

Scripted tests often miss real-world scenarios, allowing defects to surface in production and eroding trust.

Change Fatigue & Communication Debt

People hear dates, not "why," so engagement drops and good releases land flat.

What you're actually buying: DCG leadership in the room

When ERP is wobbling, the missing ingredient isn't another tool. It's leadership. DCG provides leadership as a service where senior operators steady the program and the room. We've directed over \$65M+ in ERP turnarounds (equivalent to approximately 200 years of person-hours), often guiding teams of 30-40 people through recovery. You're not getting a bus of juniors and a playbook; you're getting experienced leaders who make decisions simpler, trade-offs explicit, and momentum visible.

How our leadership shows up for you	What changes for you
<div>>> Board-fluent communication:</div> <div>One-page, numbers-first briefs for CEOs, boards, and PE sponsors so your sponsor gets real air cover.</div> <div>>> Decision cadence:</div> <div>We run the change review board with a value-over-effort gate and close scope drift quickly.</div>	<div>>> CFO:</div> <div>Faster path to cash protection, a board-ready story, and spend gated by measurable value.</div> <div>>> CIO:</div> <div>Clearer scope and cadence, fewer surprises, vendors held to outcomes rather than hours.</div>

How our leadership shows up for you

>> **KPI truth set**

We set up the leadership dashboard and lock definitions so finance, ops, and IT act from the exact numbers.

>> **Vendor governance**

We run the change review board with a value-over-effort gate and close scope drift quickly.

>> **Delivery rhythm**

We provide weekly value huddles that track KPI deltas, cash effects, and release readiness.

>> **Risk containment**

We tighten access and approvals, define rollback plans, and keep audit trails clean.

>> **People and momentum**

We create charismatic, high-energy, focused facilitation that rebuilds confidence and accountability.

What changes for you

>> **COO**

Operational stability returns, adoption rises, and the team sees wins on the floor.



SPEAR: DCG’s clarity engine behind every rescue

SPEAR is DCG’s proven readiness-to-results methodology, which keeps executives in control of scope, spend, and sequence while bringing operators into the decision-making loop. It’s purpose-built for new implementations and rescue situations.

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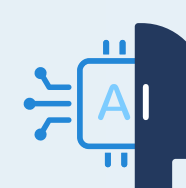
Surveillance

» Build trust in data: real-time visibility into processes, throughput, exceptions (cash, inventory, order cycle, etc.)
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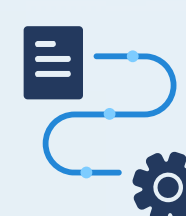
Performance

» Publish credible KPIs and owner-level accountabilities; close gaps quickly.
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Excellence

» Standardize the “rules of the ERP game” in order to arrive at predictable and high-quality processes (policies, activity-based costing, handoffs).
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AI/Automation

» Only automate what’s measurable and well-ruled; then begin to inject AI/Agentic protocols into the business.
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Requirements & Roadmap

» A stepped path from strategy to sprint-ready specifications, so UAT finds problems early (by design) and delivery is antifragile.

SPEED

Readiness scoring (Strategy, Posture, Education, Enthusiasm, Deployment) provides executives with a common language to quickly gauge change readiness across teams before committing new spending.

For CIOs

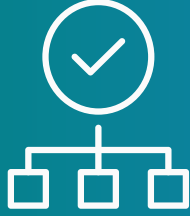
You get a single place of truth that connects budgets to business outcomes and a cadence that finance can back.

For CFOs

SPEAR sequences work to reduce variance early, before you invest in customization; then scale automation once governance and data are established. That’s how you protect EBITDA while you recover.

Red flags to look for in an ERP implementation that already requires, or will require, rescue



 Risk signal	 Leading indicator	 Financial impact	 Quick test
PO-to-Invoice latency rising	Unmatched GR/IR, manual accruals	Working capital compression	Reconcile GR/IR aging by vendor and item; tie to cycle time
Inventory accuracy in dispute	Cycle counts vs. WMS/ERP variance >5%	Write-offs, stockouts/expedites	Compare physical to system counts for the top 50 SKUs

 Risk signal	 Leading indicator	 Financial impact	 Quick test
"Phantom" backlog of orders	Duplicate orders, pricing overrides	Revenue leakage, margin erosion	Net open orders vs. capacity; price waterfall audit
Unknown integration owners	Shadow IT workflows, failed jobs	Rework, delay penalties	Map critical interfaces; assign SLA + RTO/RPO
AI/automation without guardrails	"Shadow AI" usage in finance ops, rules misfiring, incorrect payments or invoices going out	Compliance & breach exposure	Check for AI tools in AP/AR; confirm access controls & logging

Note: IBM's 2025 breach data highlights "shadow AI" as a growing cost driver; CFOs should treat AI controls as part of ERP risk hygiene.

Use the ERP Recovery Checklist by DCG to identify warning signs early, protect cash flow, and confirm whether your ERP program is veering off course.





Your 30-day ERP rescue roadmap

A CFO-first Approach



TL;DR: ERP Turnaround at a Glance

Phase	Goal	Top Moves	Proof (Targets)
 0-10 days “Get Back Up”	Justify investment; trust the process	Leadership dashboard; pause low-ROI work; assess past-vendor efforts & their current open invoices; one-page solution map (L1/L2); mobilize team; rapid analysis (L3); high level roadmap; senior stakeholder buy-in	Backlog ↓ ~60%; 8-12 trusted KPIs live; Past-vendor AP analysis
 11-29 days “Get to Roadmap”	Replan to value	Document requirements with proven rigor (L3); rank backlog by value vs effort (L4); choose configure vs custom (L4); establish detailed roadmap; ship 1-2 quick wins (L5)	Signed scope; top-10 backlog tied to cash/cost; first wins in production if possible
 30+ days “Off and Running”	Ship and prove payback	Short sprints with detailed acceptance (L5/L6); weekly value huddle; question the need for complexity & automation - only when ready (L4/L5)	Detailed roadmap and milestones on a daily/weekly/monthly basis for all stakeholders

(Illustrative benchmarks; your baseline and targets will vary)



0-10 days
“Get Back Up”



Goal: Justify investment and rebuild trust in the plan and the numbers.



What we’re doing (fast, visible work):

01

Leadership dashboard (single source of truth)

- Show the few metrics that matter now: cash conversion, invoice aging, goods received vs. invoices received (GR/IR), days sales outstanding (DSO), days payable outstanding (DPO), inventory turns, and exception rates.

02

Pause low-ROI work; triage the backlog

- Freeze nonessential customizations; stop work that isn’t tied to near-term cash or risk.
- Run a triage sprint to close or combine duplicate tickets and quick-fix defects.

03

Assess past-vendor efforts & open invoices

- Reconcile statements, identify disputed charges, and tie spend to delivered outcomes.
- Produce a short AP analysis for prior vendors (what’s owed, what’s justified, what’s not)

04

Capture the facts on one page (L1/L2)

- Leverage a solution map that names owners, first-wave capabilities (e.g., pick/ship, invoice-to-cash), and the maturity target for each.

05

Rapid analysis (L3) + a high-level roadmap

- Get a quick fit/gap check on the top value streams and a 90-day sketch of what ships when.

06

Mobilize the team + secure senior buy-in

- Stand up a small Change Review Board (CFO, CIO, delivery lead) with a simple gate: every dollar must have a plausible payback.

What you should see by Day 10

Backlog ↓ significantly
(closed/merged/fast-fixed issues and decisions).

8-12 key objectives
with clear owners and definitions.

Past-vendor AP analysis
completed, with recommendations on payment holds or credits.



11-29 days

“Get to Roadmap”



Goal: Replan to value with documented requirements, a costed backlog, and first wins.



What we’re doing (build the engine for the next 60 days):

01

Document requirements with rigor (L3)

- Lay down requirements for the top value streams (Procure-to-Pay, Order-to-Cash, Inventory) in easy terms, tied to KPIs and business outcomes.

02

Rank the backlog by value vs. effort (L4)

- Mark each item as configure/standard/custom and attach a rough effort.
- Finance signs off on the prioritization, so funding follows the best payback.

03

Decide configure vs. custom (L4) and set vendor SLAs

- Eliminate “nice-to-have” custom asks; get vendors to commit to response and delivery times.
- Produce a short AP analysis for prior vendors (what’s owed, what’s justified, what’s not)

04

Ship 1-2 quick wins (L5)

- Examples: tighten pricing governance, automate 3-way match in AP, or fix a high-leakage posting rule.

05

Publish the detailed roadmap

- See what ships in which sprint, who owns it, and what KPI it moves.

What you should see by Day 29

Signed scope

proving everyone understands (the “what” and the “why”).

Top-10 backlog

tied to cash/cost metrics and approved by finance.

First wins in production

(where feasible), with before/after KPIs.



30+ days

“Off and Running”



Goal: Ship value and prove payback on a steady cadence.



What we’re doing (execute, measure, repeat):

01

Short sprints with detailed acceptance (L5/L6)

- Gain clear specs, real-world test scenarios, and acceptance rules that tie to financial outcomes.

02

Weekly value huddle (finance + ops + IT)

- Track run-rate savings, working-capital effects, and defect burn-down; unblock decisions fast.

03

Question complexity; automate only when ready (L4/L5)

- Add automation after data is trustworthy and the business rules are stable, so we avoid expensive do-overs.



What you should see from Day 30 onward

- A **detailed roadmap and milestones** visible daily/weekly/monthly to all stakeholders
- Sprints that **move the numbers** (e.g., faster invoice cycle time, higher pick accuracy, fewer short-shipments)
- A straightforward, repeatable **ROI narrative** your finance team can share with the board

What success looks like in 30 days:



Confidence

One truth, zero guesswork. Leaders can answer “Are we okay?” on a single slide.



Clarity

A simple, sequenced plan with named owners and clear guardrails on spend.



Regaining the Initiative

The program sets the pace again: risks contained, decisions fast, momentum visible.

What success looks like long term:



Operational

Defect severity trending down; throughput and cycle times improving; fewer manual workarounds.



Financial

OPEX reduction through vendor consolidation; reduced leakage (chargebacks, write-offs); accelerated cash collection.



Governance

Clear, audited controls; predictable change cadence; single, trusted KPI set for the exec team.

How DCG makes it predictable

- SPEAR is the playbook; DCG's experience keeps you in control. We align executives and operators around a single page of truth and sequence investments to your cash constraints, with no black boxes and no "trust us" estimates.
- Fix what pays, keep what works, no rip-and-replace. Consistent with what **Gartner** points out, we target capability-centric modernization and incremental value realization.
- Level-wise clarity reduces rework as we separate strategy and scope decisions (L1-L5) from engineering and release (L6), so UAT becomes an instrument for learning, not a cliff where budgets go to die.
- Finance processes are high-value targets; our rescue layers in AI/tooling governance and identity controls mitigate the breach-cost exposures highlighted by IBM.

What to do next? Low-commitment, high value

Run the ERP Rescue Assessment

Answer a few practical questions and get a SPEAR-aligned snapshot of where value is leaking, the quickest fixes, and which KPIs to track first.



Get a Quick Health Check

Looking for a working session, not a sales pitch?

Bring your current state. We'll map the quickest path to cash and control, using your metrics and our SPEAR framework.



Schedule Your ERP Health Check

About Dynamic Consultants Group (DCG)

DCG is a global, full-stack Microsoft Solutions Partner helping organizations transform with clarity, control, and measurable impact. Founded in 2012 and headquartered in Kansas City, Missouri, DCG delivers end-to-end Microsoft solutions across Dynamics 365, ERP, and CRM, Azure cloud modernization, M365, Power Platform, project recovery, change management, and advanced support.

Anchored in our proprietary **SPEAR Framework**, we align strategy, process, and technology to reduce risk, accelerate ROI, and ensure sustainable growth. With over **700 successful implementations**, an average **43% client ROI** in year one, global delivery across seven offices, and **1M+ users** empowered worldwide, DCG turns ERP challenges into industry-defining opportunities.

Through **DCG Enterprise Support**, our high-touch alternative to Microsoft Unified Support, we resolve complex challenges at the source, ensuring performance, resilience, and long-term value.



Headquarters

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Cost of a Data Breach Report 2025 (IBM)

Gartner Finance Symposium (Gartner)

ERP Recovery Roadmap Guide: Rescue Your Failing ERP Implementation (DCG)

Rescuing ERP Implementations: Why Approach Matters in Recovery (DCG)

Glossary

AP/AR: Accounts Payable / Accounts Receivable (paying suppliers / collecting from customers).

DSO / DPO: Days Sales Outstanding (how fast you collect) / Days Payable Outstanding (how fast you pay).

ERP: Enterprise Resource Planning system (finance + operations backbone).

GR/IR: Goods Received / Invoice Received (temporary account to reconcile received goods with invoices).

KPI: Key Performance Indicator (a metric that matters).

L1–L6: DCG’s “scope-to-delivery” levels (L1–L5 = shape/scope; L6 = engineering and release).

L1: Strategic Objectives

L2: Core Processes

L3: Functional Requirements

L4: Estimations, Roadmapping, Prioritization, Sequencing, Go/No-Go Decision Making (Post Software Selection)

L5: User Experience Design

L6: Technical Implementation Specifications

OPEX / TCO: Operating Expenses (run costs) / Total Cost of Ownership (all-in cost over time).

RACI: Responsibility matrix (Responsible, Accountable, Consulted, Informed).

AI: Artificial Intelligence (assistants, models, copilots).

RPO / RTO: Recovery Point / Recovery Time Objectives (how much data you can lose / how fast you must recover).

SI: Systems Integrator (implementation partner).

SLA: Service Level Agreement (vendor performance commitments).

SoD: Segregation of Duties (no one person should control conflicting steps, e.g., create and approve payments).

SKU: Stock Keeping Unit (unique item identifier for inventory).

WMS: Warehouse Management System (software that runs warehouse operations).

UAT: User Acceptance Testing (business users verifying it works in real scenarios).

