



Project Manufacturing Process Health Checklist

Are Your Processes Supporting Growth—or Holding You Back?

Use this checklist to uncover inefficiencies, hidden costs, and growth barriers in your project-based manufacturing operation.

1. Manual Tasks & Errors

- Are BOMs, quotes, or schedules still being managed in spreadsheets?
- Do you experience delays from re-entering the same data across systems?
- Are engineering changes causing confusion downstream?
- Have data entry mistakes ever caused costly rework or missed deadlines?
- Is project costing disconnected from quoting and actuals?

2. Project Visibility & Control

- Do you track project performance in real time—or only after the fact?
- Can you easily view project profitability, resource usage, and material status mid-project?
- Do budget overruns or delivery delays often come as a surprise?
- Are WIP and cash flow difficult to forecast across active projects?
- Is invoicing frequently delayed due to poor tracking?

3. Integration of Systems

- Are your CAD, ERP, quoting, and finance tools fully integrated?
- Do handoffs between design, purchasing, and production result in delays?
- Is your team operating with inconsistent or outdated data across departments?
- Are cost or availability changes reflected automatically in sales quotes?
- Do you often need to "chase down" updates or approvals?

4. Change Readiness

- Do you have a formal, trackable change order process?
- Can you quickly adapt schedules and production plans when priorities shift?
- Are change impacts clearly communicated across teams?
- Have scope changes gone unbilled due to poor documentation?
- Is IT intervention required just to update workflows?

5. Scalability & Standardization

- Are processes consistent across teams and locations?
- Do you have centralized scheduling and resource planning?
- Is project costing standardized and transparent?
- Are administrative tasks growing faster than your margins?
- Can leadership access consolidated project data in one place?

SCORE YOURSELF

- **0–10 boxes checked:** Your systems may be holding back growth. Time for a strategic review.

- **11–20 boxes checked:** You're on the path—but significant gaps may be limiting efficiency and profitability.
- **21–25 boxes checked:** Well done. You've laid the groundwork for scalable, agile growth. Still, refinement is always possible.

Want a second opinion?

We help project manufacturers audit workflows, integrate systems, and build smarter processes with **Microsoft Dynamics 365 Business Central & Project Operations**.