



ERP Implementation Checklist

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Research

- ☐ Form an implementation team that can communicate effectively and has the knowledge and commitment to guide the project from beginning to end.
- ☐ Document and examine current business processes. Identify common problems or errors, duplicated or unnecessary efforts and missed opportunities with customers.
- ☐ Set specific goals and objectives for the ERP implementation. Define the exact requirements and functionality you need in the software.
- ☐ Put together a reasonable timeline and budget.
- ☐ Decide on key performance indicators and quantify your desired results.



Installation

- ☐ Re-engineer business processes into standard operating procedures that utilize the ERP software. Figure out which processes to automate or keep manual.
- ☐ Design a blueprint of how new business practices will flow between departments.
- ☐ Build the hardware infrastructure, such as networking facilities and data collection or display devices.
- ☐ Install the software and customizations.



Migration

- ☐ Review and edit data for accuracy and uniformity. Remove out-of-date information.
- ☐ Set up new databases, map database fields between the old and new systems, and migrate the data.



Testing

- ☐ Test all interfaces, functionality and reports with real-life scenarios and transaction data.
- ☐ Validate that business processes are flowing correctly between departments.



Training

- ☐ Develop a clear training program, thoroughly onboard the trainers and begin training users.
- ☐ Maintain consistent, meaningful communication between users, trainers and the implementation team.
- ☐ Manage change in the organization by providing opportunities for users to offer feedback and for the implementation team to act on it.



Deployment

- ☐ Decide on a deployment method: big bang, phased approach or parallel operation.
- ☐ Be flexible and available for unexpected challenges on the go-live date. Have additional, temporary IT staff on hand, as well as employees who can work overtime.
- ☐ Develop a communication strategy in case of system downtime.
- ☐ After going live, test and audit the system again for accuracy, reliability and speed. Prioritize the balance sheet, as well as the inventory and accounts receivable ledgers.
- ☐ Have IT staff support users as they verify, document and modify businesses processes in the live ERP system.



Support

- ☐ Maintain ongoing maintenance of the software and support for its users.
- ☐ Begin evaluating the success of the ERP project. Consider key performance metrics that are tied back to the goals and objectives of the project.