

ERP MIGRATION READINESS CHECKLIST

01.

STRATEGIC ALIGNMENT

- ☑ Define clear business goals for ERP implementation.
- ☑ Ensure alignment with organizational strategy and vision.
- ☑ Facilitate Project Chartering Sessions with executives and project sponsors.
- ☑ Identify measurable outcomes and key performance indicators (KPIs).
- ☑ Secure executive sponsorship and stakeholder buy-in.
- ☑ Define governance structure and decision-making framework.

02.

STAKEHOLDER ENGAGEMENT

- ☑ Identify and involve key stakeholders across departments and conduct stakeholder assessment.
- ☑ Conduct workshops to gather business requirements.
- ☑ Communicate project vision and objectives.
- ☑ Develop a change management and communication plan to keep all stakeholders informed.

03.

BUSINESS PROCESS ANALYSIS

- ☑ Understand current state (as-is) by documenting high-level current-state operating model.
- ☑ Identify issues, pain points and opportunities for improvement in the future state.
- ☑ Define future state operating model and high-level processes (to-be state).
- ☑ Validate processes with stakeholders.

04.

DATA READINESS

- ☑ Conduct a comprehensive data audit.
- ☑ Identify data quality issues (e.g., duplication, inaccuracies, inconsistencies).
- ☑ Develop a data cleansing, archival and migration strategy.
- ☑ Define a data governance framework for ongoing management.

05.

TECHNOLOGY ASSESSMENT

- ☑ Assess current IT infrastructure and integration requirements.
- ☑ Evaluate ERP solutions based on functionality, scalability, and cost.
- ☑ Confirm compliance with industry regulations (e.g., data residency, security).
- ☑ Ensure compatibility with existing systems and future growth.
- ☑ Understand technology architecture - Look under the hood.
- ☑ Validate reporting & analytics, business intelligence requirements.

06.

CHANGE MANAGEMENT

- ☑ Conduct a change readiness assessment.
- ☑ Develop a comprehensive change management and communication strategy.
- ☑ Develop detailed communication and training plan
- ☑ Identify training needs for different stakeholder groups and deliver training for all impacted users.
- ☑ Communicate benefits and address resistance proactively.
- ☑ Define criteria to measure effectiveness of change management strategies.
- ☑ Establish KPIs to measure user adoption.

07.

PROJECT PLANNING

- ☑ Define project scope and objectives.
- ☑ Develop and align on implementation roadmap.
- ☑ Develop a detailed project timeline with milestones and deliverables.
- ☑ Assign roles and responsibilities within the project team.
- ☑ Establish risk management and mitigation plans.
- ☑ Set up a dedicated project team, including IT and business experts.
- ☑ Develop a phased implementation approach (e.g., pilot, rollouts).
- ☑ Create a detailed testing plan for functionality and integrations.
- ☑ Prepare a rollback plan in case of critical failures.

08.

VENDOR SELECTION

- ☑ Create a Request for Proposal (RFP) with detailed requirements.
- ☑ Evaluate vendors based on their expertise, track record, and references.
- ☑ Evaluate ERP software based on detailed product demos with organization specific scenarios
- ☑ Evaluate Systems Integrator partner based on proven track record, detailed project plan, implementation approach & methodologies.
- ☑ Assess vendor support for implementation, training, and post-go-live assistance.
- ☑ Negotiate a clear Service Level Agreement (SLA).

09.

POST-IMPLEMENTATION PLAN

- ☑ Monitor system performance and resolve issues post-go-live.
- ☑ Collect user feedback for further improvements.
- ☑ Plan for ongoing system updates and enhancements.
- ☑ Establish metrics to track ROI and project success.

10.

BUDGET AND COST MANAGEMENT

- ☑ Develop a detailed budget, including software licensing, infrastructure (as applicable), and training costs.
- ☑ Identify potential hidden costs (e.g., customization (reports, integrations, conversions), ongoing support).
- ☑ Allocate contingency funds for unforeseen challenges resulting in project delays.