



ERP Digital Transformation Roadmap Checklist 2026

Strategic Alignment & Visioning

Define business objectives, identify key stakeholders, and align ERP transformation goals with long-term corporate strategy.

Primary Business Objective

Write something...

Strategic Vision Statement

Write something...

Key Stakeholders Involved

- ☐ C-Level Executives
- ☐ IT Department
- ☐ Operations Management
- ☐ Finance Department
- ☐ Supply Chain Leads

Strategic Roadmap Target Completion Date

Enter date...

Project Priority Level

- ☐ Critical / Urgent
- ☐ High
- ☐ Medium
- ☐ Low

Executive Sponsor Approval

Current State Assessment (As-Is Analysis)

Evaluate existing legacy workflows, identify pain points in current processes, and document existing technical debt.

Legacy System Inventory

Write something...

Current Workflow Pain Points

Write something...

Existing Data Silos

- ☐ Finance/Accounting
- ☐ Supply Chain/Logistics
- ☐ Human Resources
- ☐ Sales/CRM
- ☐ Manufacturing/Production
- ☐ Customer Support

Current Infrastructure Hosting Type

- ☐ On-Premise
- ☐ Private Cloud
- ☐ Public Cloud
- ☐ Hybrid

Current Process Flow Diagrams

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Last System Audit Date

Enter date...

Digital Maturity & Infrastructure Audit

Assess current IT infrastructure, network capabilities, and cloud readiness to support modern ERP capabilities.

Current Infrastructure Hosting Environment

- ☐ On-Premise
- ☐ Cloud (SaaS/PaaS/IaaS)
- ☐ Hybrid Cloud

Legacy System Technical Debt Assessment

Write something...

Existing Integrated Software Ecosystem

- ☐ CRM
- ☐ HRIS
- ☐ SCM
- ☐ BI/Analytics Tools
- ☐ E-commerce Platforms

Estimated Annual IT Infrastructure Spend

Enter a number...

Network Topology & Infrastructure Diagram

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Last Infrastructure Security Audit Date

Enter date...

Business Process Re-engineering (BPR)

Identify opportunities to streamline operations and redesign workflows to leverage automated ERP functionalities.

Current Process Pain Points

Write something...

Processes Targeted for Automation

- ☐ Procurement
- ☐
- ☐ Financial Reporting
- ☐ Order Fulfillment
- ☐ Human Resources
- ☐ Supply Chain Logistics

Complexity Level of Re-engineering

- ☐ Low (Minor Tweaks)
- ☐ Medium (Workflow Redesign)
- ☐ High (Complete Overhaul)

Process Redesign Completion Deadline

Enter date...

As-Is Process Flowcharts

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Process Owner Approval

Data Strategy & Governance Framework

Establish protocols for data cleansing, standardization, and long-term data management during the transition.

Data Ownership Assignment

Write something...

Data Cleansing Required Areas

- ☐ Customer Master Data
- ☐ Vendor/Supplier Master Data
- ☐ Product/SKU Information
- ☐ Financial Ledger Records
- ☐ Employee/HR Records

Data Compliance Standard

- ☐ GDPR
- ☐ CCPA
- ☐ HIPAA
- ☐ SOX
- ☐ Other/Internal Only

Data Governance Policy Summary

Write something...

Data Migration Mapping Document

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Data Audit Completion Date

Enter date...

Vendor Selection & Ecosystem Evaluation

Evaluate ERP vendors, assess integration compatibility with existing SaaS tools, and conduct technical feasibility studies.

Required ERP Core Modules

- ☐ Finance & Accounting
- ☐ Human Capital Management (HCM)
- ☐ Supply Chain Management (SCM)
- ☐ Customer Relationship Management (CRM)
- ☐ Manufacturing/Production
- ☐ Inventory & Warehouse Management

Shortlisted Vendor Names

Write something...

Vendor Technical Capability Summary

Write something...

Deployment Model Preference

- ☐ Cloud-Native (SaaS)
- ☐ On-Premise
- ☐ Hybrid Cloud

Estimated Annual License Cost (USD)

Enter a number...

Vendor Demo Deadline

Enter date...

Vendor RFP/RFI Response Documents

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Resource & Budget Planning

Allocate internal human capital, define project timelines, and establish a comprehensive Total Cost of Ownership (TCO) budget.

Project Lead Name

Write something...

Estimated Total Budget (USD)

Enter a number...

Project Commencement Date

Enter date...

Required Resource Skillsets

- ☐ Project Management
- ☐ ERP Functional Consultants
- ☐ Data Architects
- ☐ IT Security Specialists
- ☐ Change Management Experts

Budget Breakdown & Allocation Details

Write something...

Approved Budget Documentation

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Risk Management & Mitigation Strategy

Identify potential transformation bottlenecks, security vulnerabilities, and develop contingency plans for downtime.

Primary Risk Identification

Write something...

Risk Impact Assessment

Write something...

Risk Probability Level

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Mitigation Strategy Categories

- ☐ Technical Redundancy
- ☐ Staff Training
- ☐ Process Documentation
- ☐ Financial Contingency
- ☐ Vendor Escrow

Mitigation Deadline

Enter date...

Risk Mitigation Plan Document

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Risk Owner Approval

Change Management & Organizational Readiness

Develop communication plans, training frameworks, and strategies to manage cultural shifts and user adoption.

Stakeholder Groups Impacted

- ☐ Finance Department
- ☐ Operations/Supply Chain
- ☐ Human Resources
- ☐ Sales & Marketing
- ☐ IT & Technical Teams
- ☐ Executive Leadership

Communication Plan Summary

Write something...

Training & Upskilling Strategy Description

Write something...

Training Commencement Date

Enter date...

Change Readiness Level

- ☐ Low
- ☐ Moderate
- ☐ High
- ☐ Critical/At Risk

Change Management Lead Approval

Post-Transformation KPI & ROI Tracking

Define success metrics, establish monitoring dashboards, and create a framework for measuring digital transformation ROI.

Review Completion Date

Enter date...

Percentage of Target ROI Achieved

Enter a number...

Primary KPIs Monitored

- ☐ Reduction in Operational Costs
- ☐ Improvement in Process Cycle Time
- ☐ Data Accuracy Improvement
- ☐ User Adoption Rate
- ☐ System Uptime/Availability

Post-Implementation Variance Analysis

Write something...

Financial Audit Report/ROI Documentation

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Project Sponsor Approval

< Previous

> Next

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 Generate Sample Report