✅ ChecklistGuro

ERP Implementation & Optimization Checklist

Project Planning & Scope Definition

Ensuring clear goals, defined scope, and resource allocation for a successful ERP implementation.

Project Goals & Objectives

Write something...

Project Budget (USD)

Enter a number...

Project Start Date

Enter date...

Projected Go-Live Date

Enter date...

Scope Statement - Detailed Description

Write something...

Project Methodology (e.g., Agile, Waterfall)

- ☐ Agile
- ☐ Waterfall
- ☐ Hybrid

Key Stakeholders Involved

- ☐ Executive Leadership
- ☐ IT Department
- ☐ Finance Department
- ☐ Operations Team
- ☐ Sales Team

Requirements Gathering & Analysis

Capturing and documenting detailed business requirements for ERP functionality.

Describe overall business objectives for ERP implementation

Write something...

Which departments/business functions will be impacted by the ERP?

☐ Finance

☐ Sales

☐ Manufacturing

☐ Supply Chain

☐ Human Resources

☐ Inventory Management

☐ Customer Relationship Management (CRM)

Detail current pain points with existing systems

Write something...

Estimated number of users requiring ERP access

Enter a number...

What are the desired outcomes from the ERP?

☐ Increased Efficiency

☐ Improved Data Visibility

☐ Reduced Costs

☐ Better Decision Making

☐ Enhanced Customer Service

Document any regulatory or compliance requirements the ERP must support

Write something...

Vendor Selection & Contract Negotiation

Evaluating ERP vendors and securing favorable contract terms.

Define Selection Criteria

Write something...

Number of Vendors Evaluated

Enter a number...

Selection Method (RFP, Demo, etc.)

- ☐ Request for Proposal (RFP)
- ☐ Product Demonstrations
- ☐ Reference Checks
- ☐ Market Research

Vendor Proposal Documents

⬆ Upload File

Summary of Vendor Strengths & Weaknesses

Write something...

Preferred Vendor

Contract Negotiation Start Date

Enter date...

Key Contractual Terms & Conditions

Write something...

Data Migration & Cleansing

Planning and executing the transfer of data from legacy systems to the new ERP.

Data Source Identification & Documentation

Write something...

Total Records to be Migrated (Estimated)

Enter a number...

Data Cleansing Rules Applied (e.g., Deduplication, Standardization)

- [ ] Deduplication
- [ ] Standardization of Addresses
- [ ] Data Type Correction
- [ ] Date Format Standardization
- [ ] Removal of Inactive Records

Detailed Data Mapping Document (Source to Target Fields)

Write something...

Sample Data Extract (for Validation)

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Percentage of Data Cleansed/Validated

Enter a number...

Estimated Data Migration Start Date

Enter date...

System Configuration & Customization

Configuring ERP modules and customizing functionality to meet specific needs.

Describe customizations performed for Financial Modules

Write something...

Which Manufacturing Modules were customized?

☐ Bill of Materials (BOM)

☐ Production Orders

☐ Shop Floor Control

☐ Material Requirements Planning (MRP)

Number of custom reports created

Enter a number...

Default Currency for New Transactions

☐ USD

☐ EUR

☐ GBP

☐ CAD

Date of last configuration review

Enter date...

Detailed explanation of any workflow customizations.

Write something...

Integration with Existing Systems

Connecting the ERP system with other business applications.

Integration Method

- ☐ API
- ☐ Middleware
- ☐ Direct Database Connection
- ☐ Flat File Exchange

System 1 Name

Write something...

System 1 Version

Write something...

System 2 Name

Write something...

System 2 Version

Write something...

Data Mapping Details

Write something...

Data Volume (records)

Enter a number...

Scheduled Integration Run Date

Enter date...

Integration Specification Document

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Testing & User Acceptance

Thoroughly testing the ERP system and obtaining user sign-off.

Test Scenario Description

Write something...

Expected Result

Enter a number...

Actual Result

Enter a number...

Test Result (Pass/Fail)

☐ Pass

☐ Fail

☐ Not Tested

Comments/Notes (if Fail)

Write something...

Date of Test

Enter date...

Tested By (User Role)

☐ Business User

☐ IT Tester

☐ Super User

Screenshot/Supporting Documentation

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Training & Change Management

Preparing users for the new ERP system and managing organizational change.

Number of Users Requiring Training

Enter a number...

Training Delivery Methods

☐ Online Modules

☐ Instructor-Led Sessions

☐ Quick Reference Guides

☐ Train-the-Trainer

Training Start Date

Enter date...

Communication Plan Description

Write something...

Change Champion Identification

☐ Identified

☐ In Progress

☐ Not Started

Resistance Mitigation Strategies

Write something...

Training Materials (e.g., presentations, videos)

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Go-Live Planning & Execution

Developing a detailed go-live plan and executing the system launch.

Planned Go-Live Date

Enter date...

Planned Go-Live Time

Enter time...

Estimated Downtime (hours)

Enter a number...

Detailed Go-Live Checklist

Write something...

Go-Live Approach (Big Bang, Phased, Parallel)

☐ Big Bang

☐ Phased

☐ Parallel

Critical Systems to be Cutover

☐ Finance

☐ Supply Chain

☐ Manufacturing

☐ Sales

☐ HR

Backup of Existing Systems

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Rollback Plan Description

Write something...

Post-Implementation Support & Optimization

Providing ongoing support and continuously optimizing the ERP system's performance.

Date of Last System Health Check

Enter date...

Average User Satisfaction Score (Scale 1-5)

Enter a number...

Summary of Recent Performance Issues & Resolutions

Write something...

Current Support Tier Level

- [ ] Tier 1
- [ ] Tier 2
- [ ] Tier 3

Modules Requiring Optimization

- [ ] Finance
- [ ] Supply Chain
- [ ] Manufacturing
- [ ] Human Resources
- [ ] Sales & Marketing

Description of Proposed Optimization Initiatives

Write something...

Planned Date for Next System Upgrade

Enter date...

Average Response Time for Support Tickets (in hours)

Enter a number...

Security & Compliance

Ensuring data security, access controls, and regulatory compliance.

Data Security Policy Description

Write something...

Number of User Access Reviews Conducted Annually

Enter a number...

Compliance Framework (e.g., GDPR, SOX, HIPAA)

☐ GDPR

☐ SOX

☐ HIPAA

☐ Other

Data Encryption Methods Implemented

☐ At Rest

☐ In Transit

☐ Both

Last Security Audit Date

Enter date...

Security Audit Report

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Description of User Access Control Procedures

Write something...

Key Performance Indicators (KPIs) & Reporting

Defining and tracking KPIs to measure ERP success and identify areas for improvement.

System Uptime (%)

Enter a number...

Order Fulfillment Cycle Time (Days)

Enter a number...

Inventory Turnover Ratio

Enter a number...

Customer Satisfaction Score (CSAT)

Enter a number...

Employee Productivity (e.g., orders processed per hour)

Enter a number...

Reporting Frequency (for KPIs)

☐ Daily

☐ Weekly

☐ Monthly

☐ Quarterly

Last KPI Report Date

Enter date...