



ERP Post-Implementation Value Realization Checklist 2026

Pre-Defined KPI Baseline Verification

Validate and document the original performance metrics and business KPIs established during the project charter phase to serve as a benchmark for success.

Baseline Measurement Date

Primary KPI Name

Pre-Implementation Benchmark Value

Post-Implementation Target Value

KPI Criticality Level

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

Baseline Methodology Description

Write something...

Original KPI Documentation/Charter

 Upload File

Business Process Alignment Audit

Assess whether the implemented ERP workflows effectively map to the redesigned business processes and if manual workarounds have been successfully eliminated.

Process Alignment Status

- ☐ Fully Aligned
- ☐ Partially Aligned
- ☐ Requires Re-engineering
- ☐ Not Started

Gap Analysis Summary

Write something...

Identified Process Discrepancies

- ☐ Manual Workaround Required
- ☐ Redundant Data Entry
- ☐ Incomplete Workflow Automation
- ☐ Inaccurate Approval Routing

Audit Completion Date

Enter date...

Process Owner Approval

Financial ROI & Cost-Benefit Analysis

Evaluate actual expenditure versus the initial budget, including software licensing, implementation costs, and realized savings from operational efficiencies.

Total Implementation Cost (Actual)

Enter a number...

Projected ROI Percentage

Actual Operational Cost Savings

Budget Variance Status

Cost-Benefit Qualitative Analysis

Financial Audit Evidence

 Upload File

User Adoption & Proficiency Assessment

Measure the adoption rate across different departments and evaluate user competency through training follow-ups and error-rate monitoring.

Percentage of User Adoption Rate

Identified Proficiency Gaps

- ☐ Navigation & Interface
- ☐ Data Entry Accuracy
- ☐ Report Generation
- ☐ Workflow Approval Processes
- ☐ Module-Specific Functions

User Feedback Summary

Write something...

Training Completion Status

- ☐ All Training Completed
- ☐ Partial Completion
- ☐ Training Still In Progress
- ☐ Training Not Started

Training Attendance Logs

 Upload File

Department Head Sign-off

Data Accuracy & Reporting Integrity

Verify the reliability of newly generated reports and ensure that data flowing from various modules provides a 'single version of the truth' for decision-making.

Data Audit Completion Date

Enter date...

Data Integrity Status

- ☐ Fully Verified
- ☐ Minor Discrepancies Found
- ☐ Critical Errors Identified
- ☐ Requires Immediate Remediation

Percentage of Records with Zero Errors

Enter a number...

Discrepancy Investigation Summary

Write something...

Verified Data Modules

- ☐ Finance/General Ledger
- ☐ Inventory/Warehouse
- ☐ Sales & Distribution
- ☐ Procurement/Purchasing
- ☐ Human Capital Management

Data Validation Audit Report

 Upload File

Data Steward Approval

System Performance & Stability Review

Analyze system uptime, transaction processing speeds, and responsiveness under real-world enterprise workloads to ensure stability post-go-live.

Review Date

Enter date...

Average System Response Time (ms)

Enter a number...

System Uptime Percentage

- ☐ 99.9% or higher
- ☐ 95% - 99.8%
- ☐ Below 95%

Identified Performance Bottlenecks

- ☐ Database Latency
- ☐ Network Connectivity
- ☐ Server CPU/Memory Overload
- ☐ API/Integration Delays
- ☐ UI/UX Loading Delays

Detailed Observation Notes

Write something...

System Performance Logs

 Upload File

IT Manager Approval

Integration & Ecosystem Connectivity Check

Confirm that all third-party integrations (CRM, SCM, Banking, etc.) are functioning seamlessly and transferring data without latency or loss.

Integrated Third-Party Systems Verified

- ☐ CRM (Customer Relationship Management)
- ☐ SCM (Supply Chain Management)
- ☐ HRIS (Human Resources Information System)
- ☐ Banking/Payment Gateways
- ☐ E-commerce Platforms
- ☐ BI & Data Warehouse

API Connectivity Status

Write something...

Integration Latency (ms)

Enter a number...

Integration Testing Logs

 Upload File

Last Successful Data Sync Date

Enter date...

Identified Data Discrepancies

Write something...

Stakeholder Satisfaction & Feedback Loop

Conduct formal surveys and interviews with department heads and end-users to identify remaining pain points and areas for further optimization.

Survey Completion Date

Enter date...

Overall Satisfaction Score

- ☐ Very Dissatisfied
- ☐ Dissatisfied
- ☐ Neutral
- ☐ Satisfied
- ☐ Very Satisfied

Key Areas of Success

- ☐ User Interface Ease of Use
- ☐ Report Accuracy
- ☐ Process Speed
- ☐ Data Accessibility
- ☐ System Stability

Detailed Feedback and Pain Points

Write something...

Stakeholder Acknowledgment

Post-Implementation Support & Maintenance Handover

Ensure that the transition from the implementation team to the internal IT/Operations team is complete, including documentation and support escalation paths.

Handover Completion Date

Handover Documentation Checklist

- ☐ User Manuals & Training Guides
- ☐ System Configuration Documentation
- ☐ Incident Management Procedures
- ☐ Data Mapping & Integration Logs
- ☐ Vendor Contact Directory

Primary Internal Support Lead

Outstanding Issues & Known Bugs Log

Write something...

Final Sign-off Document

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Project Sponsor Approval

Continuous Improvement & Scalability Roadmap

Identify upcoming feature requirements, necessary patches, and future module expansions needed to align with long-term corporate strategy.

Identified Optimization Opportunity

Write something...

Scalability Impact Analysis

Write something...

Target Implementation Quarter

Enter date...

Priority Level

- ☐ Critical - Immediate Action Required
- ☐ High - Next Release Cycle
- ☐ Medium - Planned Roadmap
- ☐ Low - Backlog/Future Consideration

Required Resources

- ☐ IT/Technical Development
- ☐ External Consultants
- ☐ Additional Software Licenses
- ☐ Hardware/Infrastructure Upgrade
- ☐ User Training/Change Management

Roadmap Approval

< Previous

> Next

🏁 Finish

🔗 Generate Sample Report