



# ERP User Training & Adoption Checklist

## Pre-Training Planning & Assessment

Assess user skill levels, identify training needs, and define clear learning objectives.

### Number of Users Requiring Training

### User Skill Levels (Current ERP Experience)

- ☐ Beginner
- ☐ Intermediate
- ☐ Advanced
- ☐ No Experience

### Specific Training Needs Identified

### Training Needs Assessment Completion Date

### Primary Learning Style Considerations (e.g., visual, auditory, kinesthetic)

- ☐ Visual
- ☐ Auditory
- ☐ Kinesthetic
- ☐ Mixed/Unknown

### Notes/Comments on Skill Assessment

Write something...

## Training Content & Delivery

Review training materials, delivery methods, and schedule to ensure accessibility and engagement.

### Training Delivery Method

- ☐ Live Online
- ☐ In-Person
- ☐ Self-Paced E-Learning
- ☐ Hybrid

### Number of Training Sessions

Enter a number...

### Training Start Date

Enter date...

### Typical Session Length (hours)

Enter time...

### Content Formats Used

- ☐ Presentations
- ☐ Videos
- ☐ Interactive Simulations
- ☐ Job Aids

### Brief Description of Training Materials

Write something...

### Sample Training Presentation (Optional)

 Upload File

## Role-Based Training Modules

Verify completion and comprehension of training specific to each user's responsibilities.

### Module Completion: Order Processing

- ☐ Complete
- ☐ In Progress
- ☐ Not Started

### Module Completion: Inventory Management

- ☐ Complete
- ☐ In Progress
- ☐ Not Started

### Module Completion: Financial Reporting

- ☐ Complete
- ☐ In Progress
- ☐ Not Started

### Score on Post-Training Quiz (Order Processing)

Enter a number...

### Date of Training Completion (Inventory Management)

Enter date...

### Notes on User Performance (Sales Module)

Write something...

## Training Environment & Resources

Confirm adequate access to training systems, support staff, and documentation.

Number of Training Systems Available

Enter a number...

Physical Training Location(s)

 Set My Current Location



Scheduled Training Environment Refresh Date

Enter date...

Training Environment Access Instructions Document

 Upload File

Training Environment Accessibility (e.g., VPN, Dedicated)

- ☐ VPN
- ☐ Dedicated Network
- ☐ Web Browser

### Notes on Training Environment Performance/Stability

Write something...

### Number of Support Staff Available During Training

Enter a number...

## Post-Training Evaluation & Feedback

Gather user feedback, assess knowledge retention, and identify areas for improvement.

### Overall Training Satisfaction (1-5, 5=Excellent)

Enter a number...

### Was the training content relevant to your role?

- ☐ Yes
- ☐ No
- ☐ Somewhat

### What were the most valuable aspects of the training?

Write something...

**What suggestions do you have for improving the training?**

Write something...

**Do you feel confident using the new ERP features?**

☐

Yes

☐

No

☐

Somewhat

**Time spent completing training tasks (in hours)**

Enter a number...

## User Adoption Monitoring & Support

Track ERP usage, identify users struggling with adoption, and provide ongoing support.

**Number of Users Actively Using ERP**

Enter a number...

**Number of Help Desk Tickets Related to ERP**

Enter a number...

### User Proficiency Level (Self-Assessment)

- ☐ Beginner
- ☐ Intermediate
- ☐ Advanced

### Modules Users Are Struggling With

- ☐ Finance
- ☐ Inventory
- ☐ Sales
- ☐ Manufacturing
- ☐ HR

### Last Support Interaction Date

Enter date...

### Notes from Support Interactions

Write something...

### Overall User Satisfaction (Post-Support)

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

## Change Management Communication



Ensure clear and consistent communication about ERP changes and updates.

### Executive Summary for Communication

Write something...

### Communication Plan Start Date

Enter date...

### First Communication Rollout Date

Enter date...

### Communication Channels Used

- ☐ Email
- ☐ Intranet
- ☐ Team Meetings
- ☐ Company Newsletter
- ☐ Posters/Flyers

### Communication Lead Name

Write something...

### Communication Frequency (e.g., Weekly, Bi-Weekly)

- ☐ Daily
- ☐ Weekly
- ☐ Bi-Weekly
- ☐ Monthly

### Sample Communication Message (Draft)

Write something...

## Performance Metrics & Reporting

Define and track key performance indicators (KPIs) to measure user adoption and system effectiveness.

### Percentage of Users Actively Using ERP

Enter a number...

### Average Time to Complete Key Tasks (Post-Training)

Enter a number...

### Number of Support Tickets Related to ERP Usage

Enter a number...

**Overall User Satisfaction (1-5 Scale)**

- ☐ 1 - Very Dissatisfied
- ☐ 2 - Dissatisfied
- ☐ 3 - Neutral
- ☐ 4 - Satisfied
- ☐ 5 - Very Satisfied

**Data Entry Error Rate (Post-Training)**

Enter a number...

**Date of Last Performance Review Related to ERP Adoption**

Enter date...