



ERP Workflow Optimization Checklist

Workflow Identification & Prioritization

Identifying key workflows within the ERP system and prioritizing them for optimization based on impact and effort.

Describe the overall business objective this workflow supports.

Write something...

Select the primary business function affected by this workflow (e.g., Order Management, Inventory, Finance).

- ☐ Order Management
- ☐ Inventory Management
- ☐ Finance & Accounting
- ☐ Manufacturing
- ☐ Supply Chain
- ☐ Human Resources

Estimated current annual cost of this workflow (in USD).

Enter a number...

Estimated potential cost savings with optimization (in USD).

Enter a number...

Select the current workflow status.

- ☐ Not Started
- ☐ In Progress
- ☐ Completed

Target completion date for workflow optimization.

Enter date...

Select all departments involved in this workflow.

- ☐ Sales
- ☐ Marketing
- ☐ Operations
- ☐ Finance
- ☐ IT

Current State Analysis

Mapping existing workflows, documenting steps, identifying bottlenecks, and gathering data on cycle times and error rates.

Workflow Description

Write something...

Average Cycle Time (Days)

Enter a number...

Error Rate (%)

Enter a number...

Identified Bottlenecks/Pain Points

Write something...

Primary System Used (If Multiple)

- ☐ ERP Module A
- ☐ ERP Module B
- ☐ Third-Party Integration
- ☐ Manual Process

Date of Last Workflow Review

Enter date...

Process Redesign & Simplification

Redesigning workflows to eliminate unnecessary steps, automate tasks, and improve overall efficiency. Focus on clarity and reduced complexity.

Describe current process steps in detail

Write something...

Identify and describe bottlenecks or pain points

Write something...

Estimated reduction in process steps

Enter a number...

Method used for process simplification

- ☐ Elimination
- ☐ Combination
- ☐ Reordering
- ☐ Automation suggestion

Describe proposed simplified process steps

Write something...

Estimated reduction in processing time (in minutes)

Enter a number...

Potential impact on data accuracy

- ☐ Positive
- ☐ Negative
- ☐ Neutral

Automation & Integration Opportunities

Identifying tasks and processes suitable for automation through ERP functionality, scripting, or integration with other systems.

Identify Tasks for Robotic Process Automation (RPA)

- ☐ Data Entry
- ☐ Invoice Processing
- ☐ Report Generation
- ☐ Order Fulfillment
- ☐ Inventory Updates

Which ERP Modules could benefit from API Integration?

- ☐ CRM
- ☐ eCommerce
- ☐ SCM
- ☐ Payment Gateway
- ☐ Marketing Automation

Estimated Time Saved (hours/week) through Automation

Enter a number...

Preferred Integration Method (if applicable)

- ☐ Direct API
- ☐ Middleware
- ☐ File Transfer (SFTP)

Detailed Description of Automation Scope

Write something...

Role & Responsibility Alignment

Ensuring clear assignment of roles and responsibilities within each workflow to prevent confusion and ensure accountability.

Workflow Owner (Primary)

- ☐ Finance
- ☐ Operations
- ☐ Sales
- ☐ IT
- ☐ Human Resources

Workflow Approver(s)

- ☐ Department Head
- ☐ Manager
- ☐ Executive

Workflow Owner Contact Information

Write something...

Detailed Description of Owner Responsibilities

Write something...

Key Contact for Workflow Support

Write something...

Departments Involved

- ☐ Sales
- ☐ Marketing
- ☐ Finance
- ☐ Operations

Escalation Contact (for issues)

Write something...

System Configuration & Customization

Configuring the ERP system to support the optimized workflows, including setting up rules, triggers, and approvals.

Workflow Trigger Type

- ☐ Manual
- ☐ Scheduled
- ☐ Event-Based

Approval Limit (for automated approvals)

Enter a number...

Automated Tasks

- ☐ Email Notifications
- ☐ Record Creation
- ☐ Data Validation
- ☐ Report Generation

Scheduled Task Start Date

Enter date...

Custom Scripting Notes (if applicable)

Write something...

Default Record Status

- ☐ Draft
- ☐ Pending Approval
- ☐ Approved
- ☐ Rejected

User Training & Adoption

Providing training to users on the new workflows and processes to ensure proper adoption and minimize resistance to change.

Number of Users Trained

Enter a number...

Training Completion Date

Enter date...

Training Modules Covered

- ☐ Workflow Overview
- ☐ System Navigation
- ☐ Data Entry Procedures
- ☐ Reporting & Analytics
- ☐ Troubleshooting

User Feedback Summary

Write something...

Overall Training Effectiveness (Scale of 1-5)

- ☐ 1 - Very Poor
- ☐ 2 - Poor
- ☐ 3 - Average
- ☐ 4 - Good
- ☐ 5 - Excellent

Actions Required Post Training (if any)

Write something...

Testing & Validation

Thoroughly testing the optimized workflows to ensure accuracy, efficiency, and reliability before full implementation.

Number of Test Scenarios Executed

Enter a number...

Number of Defects Found

Enter a number...

Number of Critical Defects Found

Enter a number...

Test Environment Status

- ☐ Production-Like
- ☐ Development
- ☐ Sandbox

Date of Last Validation Run

Enter date...

Testing Areas Validated (Select all that apply)

- ☐ Module A
- ☐ Module B
- ☐ Integration with System X
- ☐ Reporting

Summary of Test Results and Key Findings

Write something...

Performance Monitoring & Continuous Improvement

Establishing metrics to track workflow performance and implementing a process for continuous improvement and refinement.

Average Workflow Completion Time (Current)

Enter a number...

Average Workflow Completion Time (Target)

Enter a number...

Error Rate (Current)

Enter a number...

Error Rate (Target)

Enter a number...

Date of Last Workflow Review

Enter date...

Workflow Performance Status

- ☐ On Track
- ☐ Needs Improvement
- ☐ At Risk

Summary of Recent Workflow Changes & Results

Write something...

Next Scheduled Workflow Review Date

Enter date...

Documentation & Knowledge Transfer

Creating comprehensive documentation of the optimized workflows and processes to facilitate knowledge transfer and future improvements.


Workflow Process Documentation

Write something...

Training Materials Summary

Write something...

Workflow Diagram (PDF)

 Upload File

Knowledge Base Location

- ☐ Shared Drive
- ☐ Wiki
- ☐ Intranet
- ☐ Other

Documentation Review Date

Enter date...

Contact Person for Workflow Questions

Write something...