✅ ChecklistGuro

MRP System Implementation Checklist

Project Planning & Scope Definition

Defining project goals, scope, and establishing the project team.

Project Name

Write something...

Project Objectives & Goals

Write something...

Estimated Budget

Enter a number...

Project Start Date

Enter date...

Projected Go-Live Date

Enter date...

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

☐ Agile

☐ Waterfall

☐ Hybrid

Scope Definition - Inclusions

Write something...

Scope Definition - Exclusions

Write something...

Requirements Gathering & Analysis

Documenting specific business and technical requirements for the MRP system.

Describe Current Business Processes

Write something...

Number of Users Requiring Access

Enter a number...

Preferred Deployment Method (Cloud/On-Premise)

☐ Cloud

☐ On-Premise

Key Modules Required (select all that apply)

☐ Inventory Management

☐ Production Planning

☐ Sales & Order Management

☐ Purchasing

☐ Financials

Target Go-Live Date

Enter date...

Specific Reporting Requirements

Write something...

Vendor Selection & Contract Negotiation

Evaluating and selecting an MRP vendor and finalizing the contract.

Define Selection Criteria

Write something...

Selection Method (RFI, RFP, Demo)

- ☐ Request for Information (RFI)
- ☐ Request for Proposal (RFP)
- ☐ Vendor Demos

Key Evaluation Factors

- ☐ Pricing
- ☐ Functionality
- ☐ Implementation Timeline
- ☐ Vendor Reputation
- ☐ Support & Maintenance
- ☐ Scalability

Vendor Score (per factor)

Enter a number...

Vendor Proposal Documents

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Proposal Due Date

Enter date...

Contract Review Comments

Write something...

System Design & Configuration

Designing the system architecture and configuring the MRP software.

Define Core Business Processes to be Supported

Write something...

Number of Users (Estimated)

Enter a number...

Modules to be Implemented (Select all that apply)

- [ ] Inventory Management
- [ ] Production Planning
- [ ] Materials Requirements Planning (MRP)
- [ ] Sales and Order Management
- [ ] Supply Chain Management
- [ ] Financials

Units of Measure Configuration

- [ ] Metric
- [ ] Imperial
- [ ] Both

Date of System Design Review

Enter date...

Document any Customization Requirements

Write something...

Data Migration & Cleansing

Planning and executing the migration of data from legacy systems to the new MRP system, ensuring data accuracy.

Describe data sources to be migrated.

Write something...

Estimated number of records in each source table.

Enter a number...

Data cleansing rules and procedures (e.g., handling missing values, duplicate removal).

Write something...

Sample data files for testing cleansing rules.

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Data validation method.

☐ Automated Script

☐ Manual Review

☐ Hybrid Approach

Target completion date for data cleansing.

Enter date...

Percentage of data cleansed and validated.

Enter a number...

System Integration

Integrating the MRP system with other relevant business systems (e.g., CRM, accounting).

Describe Integration Points

Write something...

CRM System Integration?

☐ Yes

☐ No

Accounting System Integration?

☐ Yes

☐ No

Number of API Connections Required

Enter a number...

Integration Design Document

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Planned Integration Completion Date

Enter date...

Describe Data Transformation Rules

Write something...

Testing & Validation

Conducting thorough testing of all system functions and integrations.

Number of Test Cases Executed

Enter a number...

Number of Defects Found

Enter a number...

Test Environment Status

- ☐ Production
- ☐ Staging
- ☐ Development

Summary of Key Test Results

Write something...

Functional Areas Tested (Select all that apply)

- ☐ Inventory Management
- ☐ Production Planning
- ☐ Sales and Order Management
- ☐ Purchasing
- ☐ Finance

Date of Test Execution

Enter date...

Detailed Description of Critical Defects

Write something...

User Training

Developing and delivering training to all users of the MRP system.

Number of Users Trained

Enter a number...

Training Start Date

Enter date...

Training End Date

Enter date...

Training Curriculum Outline

Write something...

Modules Covered (select all that apply)

☐ Inventory Management

☐ Production Planning

☐ Sales & Order Management

☐ Purchasing

☐ Financials

User Feedback Summary (post-training)

Write something...

Trainer Signature

Go-Live Planning & Execution

Planning and executing the system go-live process.

Planned Go-Live Date

Enter date...

Planned Go-Live Time

Go-Live Communication Plan (Details of announcements, stakeholder notifications)

Write something...

Number of Support Staff Available During Go-Live

Enter a number...

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

☐ Big Bang

☐ Phased

☐ Parallel

Critical Systems to be Switched On During Go-Live (Select all that apply)

- ☐ Production Planning
- ☐ Inventory Management
- ☐ Order Management
- ☐ Purchasing
- ☐ Sales
- ☐ Finance

Go-Live Checklist Document

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Post-Implementation Support & Optimization

Providing ongoing support and optimizing the system performance.

Go-Live Date

Enter date...

Users Requiring Additional Training

Enter a number...

Summary of Initial Post-Implementation Issues

Write something...

Areas for Optimization (Select all that apply)

☐ Inventory Management

☐ Production Scheduling

☐ Demand Forecasting

☐ Reporting & Analytics

☐ User Interface

Date of Next System Review

Enter date...

Proposed Optimization Actions & Timelines

Write something...

System Administrator Approval