



Supply Chain Technology Implementation Checklist

Planning & Scope Definition

Initial assessment, goal setting, and defining project scope and objectives.

Project Goals & Objectives

Estimated Project Budget

Project Start Date (Planned)

Project End Date (Planned)

Implementation Approach (e.g., Phased, Big Bang)

- ☐ Phased
- ☐ Big Bang
- ☐ Hybrid

Defined Scope (Inclusions)

Write something...

Defined Scope (Exclusions)

Write something...

Key Stakeholders

- ☐ Executive Sponsor
- ☐ Project Manager
- ☐ IT Department
- ☐ Supply Chain Team

Requirements Gathering & Analysis

Identifying and documenting detailed functional and non-functional requirements.

Describe current supply chain processes impacted by the new technology.

Write something...

Estimated number of users requiring access to the new technology.

Enter a number...

Integration with existing ERP system required?

☐ Yes

☐ No

Which functionalities are critical for initial implementation?

☐ Inventory Management

☐ Order Processing

☐ Warehouse Management

☐ Transportation Management

☐ Demand Forecasting

Target date for initial system go-live.

Enter date...

Describe any specific regulatory or compliance requirements that must be met.

Write something...

Vendor Selection & Contract Negotiation

Evaluating potential vendors, conducting demos, and finalizing contract terms.

Selection Method Used

- ☐ Request for Proposal (RFP)
- ☐ Request for Information (RFI)
- ☐ Direct Negotiation
- ☐ Online Marketplace

Vendor Proposal Summary

Write something...

Total Cost of Vendor Solution

Enter a number...

Implementation Time (Days)

Enter a number...

Vendor References Checked?

- ☐ Yes
- ☐ No

Vendor Contract Document

 Upload File

Contract Start Date

Enter date...

Key Contract Terms Summary

Write something...

Technical Design & Architecture

Designing the system architecture, data flow, and integrations with existing systems.

Describe overall system architecture (diagram optional)

Write something...

Deployment Environment (Cloud, On-Premise, Hybrid)

- ☐ Cloud
- ☐ On-Premise
- ☐ Hybrid

Estimated System Downtime During Deployment (in hours)

Enter a number...

Integration Points (Select all that apply)

- ☐ ERP System
- ☐ WMS
- ☐ TMS
- ☐ CRM
- ☐ EDI

Network Bandwidth Requirements (Mbps)

Write something...

Scheduled Architecture Review Date

Enter date...

Data Migration & Cleansing

Planning and executing data migration, ensuring data quality and accuracy.

Number of Records to Migrate

Enter a number...

Description of Data Cleansing Rules

Write something...

Sample Data File (for testing)

 Upload File

Data Source System

- ☐ ERP System
- ☐ Legacy System
- ☐ Spreadsheet
- ☐ Database

Planned Start Date for Migration

Enter date...

Potential Data Quality Issues Identified

Write something...

Data Mapping Approach

- ☐ Automated Mapping
- ☐ Manual Mapping
- ☐ Hybrid Approach

System Configuration & Customization

Configuring the system to meet specific business needs and customizing where necessary.

Default Reorder Point

Enter a number...

Default Currency

☐ USD

☐ EUR

☐ GBP

☐ JPY

Custom Workflow Rules Description

Write something...

Enabled Notifications

☐ Email

☐ SMS

☐ In-App

System Start Date

Enter date...

Default Shipping Method

☐ Standard

☐ Express

☐ Overnight

Integration Testing

Testing data flow and functionality between the new system and existing systems.

Integration Point Tested

- ☐ ERP System
- ☐ WMS (Warehouse Management System)
- ☐ TMS (Transportation Management System)
- ☐ Supplier Portal
- ☐ Customer Portal

Description of Data Flow Tested

Write something...

Number of Records Tested

Enter a number...

Integration Status

- ☐ Pass
- ☐ Fail
- ☐ In Progress

Error Messages / Issues Encountered

Write something...

Date of Integration Test

Enter date...

User Acceptance Testing (UAT)

End-users testing the system to ensure it meets their needs.

Scenario 1: Order Processing - Successful?

☐ Yes

☐ No

☐ N/A

If Scenario 1 was unsuccessful, please detail the issue:

Write something...

Scenario 2: Inventory Updates - Accurate?

☐ Yes

☐ No

☐ N/A

Number of transactions tested in scenario 1:

Enter a number...

Which functionalities were tested in Scenario 2?

- ☐ Real-time Updates
- ☐ Historical Data
- ☐ Alerting
- ☐ Reporting

Date of UAT Execution:

Enter date...

Approximate time spent on UAT:


Training & Documentation

Developing training materials and user documentation.

Training Objectives Summary

Write something...

User Manual - PDF

 Upload File

Training Modules Covered

- ☐ Order Management
- ☐ Inventory Control
- ☐ Warehouse Operations
- ☐ Reporting & Analytics

Training Completion Deadline

Enter date...

Number of Trainees Attended

Enter a number...

Feedback and lessons learned from training

Write something...

Deployment & Go-Live

Planning and executing the system deployment and go-live process.

Planned Go-Live Date

Enter date...

Scheduled Cutover Time

Number of Users Impacted

Enter a number...


Deployment Strategy (Big Bang vs. Phased)

- ☐ Big Bang
- ☐ Phased

Rollback Plan Description (if applicable)

Write something...

Deployment Checklist

 Upload File

Deployment Approver Signature

Post-Implementation Support & Monitoring

Providing ongoing support, monitoring system performance, and addressing any issues.

System Uptime (%)

Enter a number...

Average Response Time (seconds)

Enter a number...

Last System Update Date

Enter date...

Severity of Latest Issue

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

Summary of Latest Issue & Resolution

Write something...

Date of Last User Feedback Survey

Enter date...

User Satisfaction Score (Scale of 1-5)

Enter a number...