

ERP IMPLEMENTATION CHECKLIST

Over 120 actionable steps to a successful and efficient ERP implementation

GUIDE HIGHLIGHTS



Planning your ERP implementation



Tips on going live, user training and software testing



Evaluating your ERP implementation's success



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This checklist breaks down your ERP implementation into manageable steps across the following categories

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CREATE A CHANGE MANAGEMENT PLAN

Whether you're upgrading a legacy system or rolling out your company's first ERP, the potential impact on the lives of your workforce is huge.

There's nothing people dislike more than unexpected, unwanted or poorly-managed change, which is why it is essential that you develop a strong communication strategy and training plan before implementing your new ERP. This will ensure the process runs smoothly and increase user buy-in to the system in the long term.

☒ CREATE A CHANGE MANAGEMENT PLAN

- ☐ Clarify what implementation support your vendor is giving you
 - ☐ Project management
 - ☐ Customization
 - ☐ Data migration
 - ☐ Consultancy
 - ☐ Training
- ☐ Forecast implementation costs and create an ERP implementation budget
 - ☐ Vendor implementation services
 - ☐ Third-party consultancy
 - ☐ Temporary staff during roll-out
 - ☐ Operations
 - ☐ Shop floor
 - ☐ Administrative
 - ☐ Staff overtime during implementation
 - ☐ Data backup and storage
- ☐ Identify metrics by which to measure ERP implementation success

☐ Create a timeline for completing the following steps:

- ☐ Data migration
- ☐ User training
- ☐ Testing
- ☐ On-the-day go-live activities

☒ **CREATE A USER ENGAGEMENT PLAN**

- ☐ Anticipate disruption to everyday activities and let affected employee groups know
- ☐ Signpost ways in which staff can raise questions or concerns about your new ERP
- ☐ Create a user training timetable and inform staff of when their slots are in advance



RECRUIT AN ERP IMPLEMENTATION TEAM

For your project to be a success, you need the right people around you to make it happen. A well-balanced implementation team should have the right mix of technical and managerial input to get things done efficiently, and should also be representative of key stakeholder needs across your organization.

☒ RECRUIT YOUR ERP IMPLEMENTATION TEAM

- ☐ Map out your implementation team requirements:
 - ☐ Managerial requirements
 - ☐ Technical requirements
 - ☐ Representation requirements
- ☐ Offer incentives for membership of implementation team and promote them company-wide
- ☐ Recruit your team:
 - ☐ Recruit technical specialists
 - ☐ Recruit managerial positions
 - ☐ Recruit representatives for key user groups
- ☐ (Optional) hire third party consultant:
 - ☐ Shortlist candidates
 - ☐ Interview and ask for references
 - ☐ Hire and onboard your consultant
 - ☐ Get budgetary sign off

☒ IMPLEMENTATION TEAM CHECKLIST

- ☐ Managerial
 - ☐ Project manager
 - ☐ C-level sponsor

- ☐ Technical
 - ☐ Application analyst
 - ☐ Application developer
 - ☐ Application test engineer
- ☐ Consultancy
 - ☐ Third-party consultant OR
 - ☐ Vendor consultant
- ☐ User group representatives
 - ☐ Shop floor
 - ☐ Engineering
 - ☐ Warehouse
 - ☐ Sales
 - ☐ HR
 - ☐ Supply chain/logistics
 - ☐ Senior management
 - ☐ Heads of department



MIGRATE YOUR LEGACY ERP DATA AND TRAIN USERS

CLEANSE AND MIGRATE YOUR LEGACY DATA

Before your staff can start using the new ERP system, you need to migrate your data from your legacy system. It makes sense to ensure it is all up-to-date and accurate whilst doing so - there's no point transferring redundant information as this will just clog up your new ERP and increase chance of error (if you have out-of-date customer addresses saved in your system)

☒ CLEANSE AND MIGRATE YOUR LEGACY ERP DATA

- ☐ Cleanse and verify your data:
 - ☐ Ensure customer contact details are correct
 - ☐ Cleanse redundant internal data, e.g out-of-date product designs and employee info
 - ☐ Cleanse redundant external data, e.g old supplier addresses and customer contacts
- ☐ Configure your databases
- ☐ Map legacy data to new database fields
- ☐ Transfer data to the new system
- ☐ Test and verify legacy data
- ☐ Test and verify new data inputs, for example:
 - ☐ Inventory data (item location, stock)
 - ☐ Production data (order volume, parts required, estimated completion date)
 - ☐ Sales data (customer contact, history of orders)
 - ☐ HCM data (payroll information, employee benefits)

TRAIN YOUR MANUFACTURING ERP USERS

User training is essential in encouraging your workforce to engage with your new ERP and not fall back on the legacy system or develop workarounds. You can only realize the full potential of an ERP system if people are using it, after all - and without adequate training this is hard to do!

We mentioned coming up with a user training plan in the 'change management' section of this checklist above - here's a little more detail.

CREATE AN ERP TRAINING PLAN

- ☐ Decide which type of training suits your workforce best (e.g e-learning modules for office-based workforces, scheduled seminars for shop floor workers)
- ☐ Identify potential super user candidates and train them to assist with troubleshooting
- ☐ Identify key user groups that need training
- ☐ Create your training schedule
 - ☐ Decide on deadline for completion of e-learning modules
 - ☐ (OPTIONAL) promote gamified incentives for completion of training
 - ☐ Decide where face-to-face training will take place
 - ☐ Create training schedule for face-to-face training

KEY ERP USER GROUPS CHECKLIST

- ☐ Senior management
- ☐ Department managers
- ☐ Accounting and finance
- ☐ Engineers
- ☐ CAD designers
- ☐ Shop floor workers
- ☐ Warehouse staff
- ☐ Supply chain workers
- ☐ Sales team
- ☐ HR staff



START YOUR ERP GO-LIVE PROCESS

There's one key secret to a successful go-live: planning.

You'll probably have done some of this already - your users are trained on the new system, your data is ready and you have the resources ready to carry through your implementation.

Still, the go-live requires a level of organization above all of this, because to put it bluntly, things will seem a little chaotic until it's over. Whilst your systems are down, it's essential that you know who's doing what, when they plan on doing it and who to contact when issues arise.

Make sure to communicate any plans to the wider workforce as well as to your implementation team - if their activities are affected during any downtime, they need to know.

ERP GO-LIVE CHECKLIST

- ☐ Conduct pre go-live software tests:
 - ☐ Integration testing (eg WMS, PLM, SCM)
 - ☐ Functional testing
 - ☐ System testing
 - ☐ Stress testing
 - ☐ Performance testing
 - ☐ Usability testing with key user groups
 - ☐ Acceptance testing with key user groups - see above
- ☐ Create a communication plan for on-the-day go-live activities during system downtime
- ☐ Create and schedule data backup processes
- ☐ Schedule:
 - ☐ Staff overtime
 - ☐ Temporary staff hours
 - ☐ Network speed and reliability checks
- ☐ Create plan for evaluating success of ERP implementation project
- ☐ Conduct post go-live software tests



EVALUATE THE SUCCESS OF YOUR ERP IMPLEMENTATION

Unless you've made a terrible selection choice or you've somehow managed to set everything on fire, you probably won't need to implement another ERP for a while. You still need to evaluate your project, as this will help you make adjustments and identify if you're on track for a positive ROI.

Try to see this as an ongoing process. Your business won't stand still, so neither should your ERP.

✓ TO CONSIDER IMMEDIATELY POST IMPLEMENTATION

- ☐ Was your implementation within budget?
- ☐ Was your implementation within schedule?
- ☐ Did you have all the resources we needed to complete the project effectively? If not:
 - ☐ Where were there gaps?
 - ☐ How could you fill them?
- ☐ What went well?
- ☐ What went wrong, and how can you learn from it?
- ☐ Are key user groups embracing the new ERP? If not:
 - ☐ Why not?
 - ☐ What is the best way to deliver refresher training?

✓ TO MONITOR CONTINUOUSLY POST IMPLEMENTATION

- ☐ Have productivity levels increased?
- ☐ Has client satisfaction increased?
- ☐ Is human error decreasing (e.g shipment errors, wrong due-date)?
- ☐ Is your new ERP producing a positive ROI? If so, how many months post-implementation?
- ☐ Are staff continuing to use the ERP as designed or are they developing workarounds? Consider:
 - ☐ Why not?
 - ☐ What is the best way to deliver refresher training?
- ☐ Do you need any extra functionality? If so, when should you plan on adding it?

This guide was written by Rick Carlton and Tom Millers, ERP Focus columnists, with contributions from Kathryn Beeson, ERP Focus Editor

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