



Start With ERP System Checklist PDF

Checklist with different checkpoints to consider for small or medium businesses (SMB).

This document is meant for informational purposes only.

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1. Assess Business Needs

- Identify pain points and inefficiencies in current processes.
- Determine which areas need improvement (e.g., inventory management, accounting, sales, production, quality control or human resources).
- Set clear goals for an implementation plan, for all managers with a timeline.

2. Define Requirements

- List key functionalities needed (e.g., financials, sales, delivery).
- Decide if customization is needed or a ready system solution is sufficient.
- Plan for current and future scalability in case of handling unexpected growth.

3. Evaluate ERP Solutions

- Research ERP solutions tailored for small businesses (e.g., saas-based, cloud-based or on-premise). Possibility of custom development.
- Compare pricing models (subscription vs. one-time license fee).
- Check for ease of integration with existing software (e.g., accounting) or the possibility of using a few systems side by side.
- Look into vendor support, free resources and access to good documentation.

4. Consider Cloud vs. On-Premise ERP

- Evaluate the benefits of a cloud-based ERP (lower upfront cost, remote access).
- Weigh the pros and cons of on-premise solutions (data control, costs and security).
- Assess your company's IT infrastructure and risk for potential bottlenecks.

5. Budget Planning

- Estimate the total cost of ownership (software, implementation, training, support).
- Account for hidden costs (e.g., custom development, upgrades, maintenance).
- Set a realistic budget for ongoing support and employee training.

6. Choose an Implementation Partner

- Select a reliable implementation partner (if needed) with experience.
- Ensure the vendor offers services like resources, development, and support.
- Look for post-implementation support options (e.g., troubleshooting, bug fixes).

7. Data Migration Strategy

- Prepare a data migration plan (clean data for migration or manual entry).
- Determine which legacy data to transfer to the new system if any.
- Test the data migration process in a controlled environment.

8. Team Training

- Assign a head or a project team to manage the ERP implementation.
- Arrange comprehensive training for employees internally.
- Schedule training meetings for ongoing education.

9. Plan the Implementation Timeline

- Develop a realistic implementation timeline with key milestones or KPI's.
- Minimize disruption to daily operations when switching over.
- Allow time for testing and adjustments during the rollout.

10. Test the System

- Conduct thorough system testing to identify potential issues/bugs.
- Test key functionalities with real business data and cross check operations.
- Gather feedback from users during the testing phase.

Bonus checkpoints after ERP System implementation ↓

11. Monitor and Analyze Post-Implementation

- Track key performance indicators (KPIs) to measure system effectiveness.
- Address any issues promptly with your ERP provider in case of any issues.
- Review the system periodically to ensure it meets evolving business needs.

12. Continuous Improvement

- Stay updated on new features, updates, and/or improved modules.
- Regularly assess if the ERP is providing a wanted return on investment (ROI).
- Encourage feedback from employees for further improvements to the vendor.

13. Evaluate the adoption

- Do a simple SWOT to find out the company staff's pain points of training.
- Find out if regular training is necessary to keep a high standard of efficiency.
- Make a plan for best practices for the company using the new system.

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