



◆ I. Pre-Implementation Planning (15 points)

1. Define clear project objectives
2. Identify key stakeholders
3. Form an ERP project team
4. Appoint a project manager
5. Conduct a current systems audit
6. Document existing workflows
7. Define critical pain points
8. Establish budget and timeline
9. Identify key performance indicators (KPIs)
10. Choose ERP deployment type (cloud/on-premises/hybrid)
11. Develop communication plan
12. Evaluate change management risks
13. Get executive buy-in and support
14. Identify compliance and legal requirements
15. Set expectations with all departments

◆ II. ERP Selection (10 points)

16. Identify core ERP requirements (functional & technical)



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17. Research ERP vendors and partners
18. Request for proposal (RFP) from shortlisted vendors
19. Evaluate vendor demos based on real-case scenarios
20. Check vendor references
21. Perform total cost of ownership analysis
22. Assess vendor support and SLA terms
23. Select ERP with industry-specific modules
24. Choose implementation partner
25. Finalize contract with clear scope and milestones

◆ III. Project Planning & Scoping (10 points)

26. Create detailed project plan
27. Define implementation phases and sprints
28. Establish change control process
29. Finalize data migration strategy
30. Schedule regular steering committee reviews
31. Develop risk management plan
32. Assign responsibilities clearly
33. Prepare contingency and backup plans
34. Confirm legal and regulatory compliance



35. Define exit strategy or rollback procedures

◆ IV. Business Process Mapping (10 points)

- 36. Map current (as-is) processes
 - 37. Identify areas of process improvement
 - 38. Define future (to-be) processes
 - 39. Validate process changes with stakeholders
 - 40. Align ERP functionality with desired processes
 - 41. Document process flows and SOPs
 - 42. Ensure cross-departmental alignment
 - 43. Identify automation opportunities
 - 44. Flag legacy customizations that can be avoided
 - 45. Obtain sign-off on finalized workflows
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◆ V. Data Preparation and Migration (10 points)

- 46. Identify all data sources
- 47. Define data ownership and responsibilities
- 48. Clean and deduplicate data
- 49. Map data fields to ERP structure
- 50. Define migration schedule and tools



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- 51. Perform test migrations
- 52. Validate migrated data accuracy
- 53. Secure data backups
- 54. Set up audit trails and logs
- 55. Document migration methodology

◆ VI. System Configuration (10 points)

- 56. Set up chart of accounts and financial modules
- 57. Configure user roles and permissions
- 58. Customize dashboards and reports
- 59. Enable necessary localizations (tax, language, etc.)
- 60. Define approval workflows
- 61. Configure alerts and notifications
- 62. Map product master and inventory hierarchies
- 63. Configure CRM, HR, sales, and production modules
- 64. Define multi-entity or multi-location setup
- 65. Perform initial integration testing

◆ VII. Integration and Interfaces (10 points)

- 66. Identify third-party systems to integrate



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- 67. Define API or data exchange formats
- 68. Build custom connectors if required
- 69. Test real-time and batch integrations
- 70. Ensure security between systems
- 71. Set up EDI if applicable
- 72. Configure POS, eCommerce, and mobile apps
- 73. Test edge-case transactions
- 74. Validate end-to-end data flow
- 75. Monitor for latency and performance

◆ VIII. Testing (10 points)

- 76. Prepare test cases for all modules
- 77. Conduct unit testing
- 78. Conduct integration testing
- 79. Execute user acceptance testing (UAT)
- 80. Record and resolve defects
- 81. Validate reporting accuracy
- 82. Simulate go-live scenarios
- 83. Test backup and restore procedures
- 84. Test multi-user performance

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85. Get sign-off on test outcomes

♦ IX. Training and Documentation (10 points)

86. Prepare training materials and manuals

87. Conduct role-based training sessions

88. Train ERP administrators

89. Provide hands-on workshops

90. Document system configurations

91. Create troubleshooting FAQs

92. Schedule refresher training

93. Provide helpdesk access or LMS

94. Capture video tutorials for future use

95. Get feedback on training effectiveness

♦ X. Go-Live Preparation (10 points)

96. Finalize go-live date

97. Set go/no-go criteria

98. Inform all users about go-live schedule

99. Prepare support teams

100. Freeze data for final migration



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- 101. Perform final data migration
 - 102. Validate system readiness
 - 103. Communicate change to customers/vendors
 - 104. Set up war room for go-live
 - 105. Perform final sign-off by project team
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◆ XI. Post-Go-Live Support (5 points)

- 106. Monitor transactions and issues
 - 107. Provide hypercare support
 - 108. Resolve user queries promptly
 - 109. Monitor data integrity
 - 110. Track user login and access patterns
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◆ XII. Optimization & Continuous Improvement (5 points)

- 111. Collect post-implementation feedback
 - 112. Evaluate ERP performance vs. KPIs
 - 113. Identify additional automation opportunities
 - 114. Apply patches and updates
 - 115. Plan for future scalability
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♦ XIII. Review & Closure (5 points)

- 116. Review lessons learned
- 117. Document success stories and issues
- 118. Archive implementation documents
- 119. Release project resources
- 120. Celebrate and reward project success