

# ERP Readiness Checklist

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Twelve things to prepare before your implementation. The SMEs that prepare consistently finish faster, spend less, and get their teams on board quicker. Tick each box as you go.

## A PROCESS PREPARATION

**1. Document your top 5 workflows**

Quote-to-cash, procure-to-pay, inventory, month-end, and client service: who starts each, the steps, and where work gets stuck.

**2. Identify your single biggest bottleneck**

Name the workflow that hurts most. That is where your implementation should begin, and it hands you a quick early win.

**3. List every tool your team uses**

A simple table of each tool, what it is used for, who uses it, and its pain points. It reveals how scattered your data really is.

## B DATA PREPARATION

**4. Audit your existing data quality**

Look for duplicates, missing fields, and outdated records across customer, product, vendor, and financial data.

**5. Decide what migrates and what gets archived**

Migrate active records, archive old history, and leave behind duplicates and test data. A clean start is a real gift.

**6. Identify your source of truth**

For customer, vendor, and product data, pick where the most accurate version lives today. That is your migration starting point.

## C PEOPLE PREPARATION

**7. Appoint an internal champion**

One respected, available, empowered person inside the business owns the project day to day. The single biggest success factor.

**8. Set expectations with leadership**

Brief them on the temporary productivity dip, the real timeline, and a 15 to 20% budget contingency.

**9. Schedule training time in calendars**

Block protected time: 2 to 4 hours of initial training per user, plus a 1 hour follow-up once people use it for real.

**D DECISION PREPARATION**

**10. Define 3 to 5 measurable success criteria**

Specific targets with a baseline and a number, not vague hopes like "the team will like it".

**11. Set a budget range and communicate it honestly**

Give your consultant a real range so the scope can be designed to fit it. Hiding the number only wastes everyone's time.

**12. Agree on Phase 1 vs "later" scope boundaries**

Decide what is in Phase 1 and what waits. Clear boundaries are your best defence against scope creep.

**READY TO START?**

Talk to us about a Quick Win, from RM 7,000, that solves your most painful problem in 1 to 2 weeks. We can scope it around whatever you ticked above.