

# ERP Implementation Planning Guide

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A five-phase framework with the checkpoint that closes out each phase. Print it, work through one phase per page, jot your own notes and success criteria, and tick each box as you go. Timings suit an average-sized SME with a focused scope; a larger business should expect the upper end and beyond.

## **FIVE LESSONS WORTH REMEMBERING**

- 1. The audit always takes longer, and is always worth it.**
- 2. One internal champion makes or breaks it.**
- 3. Start with standard, customise only for competitive advantage.**
- 4. Training is not a one-time event.**
- 5. Quick wins build momentum.**

## PHASE 1    AUDIT    (WEEKS 1-2) DONE ☐



## KEY ACTIVITIES

- ☐ Map current workflows
- ☐ Identify pain points and bottlenecks
- ☐ Define success criteria

- ☐ Checkpoint: Process map document signed off

## SUCCESS CRITERIA FOR THIS PHASE

MY NOTES

## PHASE 2 DESIGN (WEEKS 2-3) DONE ☐



## KEY ACTIVITIES

- ☐ Design target-state workflows
- ☐ Configure the system to match
- ☐ Plan data migration

- ☐ Checkpoint: Target workflow approved by the champion

## SUCCESS CRITERIA FOR THIS PHASE

MY NOTES

**PHASE 3 BUILD AND TEST (WEEKS 3-6)** DONE ☐



## KEY ACTIVITIES

- ☐ **Configure modules**
- ☐ **Migrate data**
- ☐ **Test with real scenarios**

- ☐ Checkpoint: UAT sign-off from key users

## SUCCESS CRITERIA FOR THIS PHASE

MY NOTES

**PHASE 4   TRAINING AND GO-LIVE   (WEEKS 6-8)** DONE ☐



## KEY ACTIVITIES

- ☐ Hands-on training, 2 to 4 hours per user
- ☐ Parallel run period
- ☐ Go-live cut-over

- ☐ Checkpoint: Go-live confirmation

## SUCCESS CRITERIA FOR THIS PHASE

MY NOTES

## PHASE 5 OPTIMISATION (ONGOING) DONE ☐



## KEY ACTIVITIES

- ☐ **Week 2 review**
- ☐ **Month 1 review**
- ☐ **Month 3 review, then quarterly**

- ☐ Checkpoint: Optimisation backlog maintained

## SUCCESS CRITERIA FOR THIS PHASE

MY NOTES