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ERP Implementation Checklist

Has your organization made the decision to implement a new ERP application?

- Why* are you implementing a new ERP application? What are the driving factors?
- Have you identified the most important business reasons for implementing a new application?
- Has an evaluation and/or analysis of various ERP applications been conducted?
- Have stumbling blocks to beginning an implementation project been identified?
- What are the deciding factors to move forward with the implementation?
- What are the final expectations of an implementation project (functionality, technology, performance)?
- Has sufficient time been allocated to the project during the implementation?
- How long do you expect the implementation project to take?
- Has a budget been drafted or approved for the project? What does that budget cover?

Who and what do you need for an implementation?

- Project Manager
This person must create and manage the project schedule, tasks and communication.
- Implementation/Core Team
The core team should consist of a cross functional group that understands your business, the project goals and knows the history of the organization.
- Systems
Determine what systems are required to support the new application. What interfaces are required to other applications?
- Business Processes
Verify that current processes are documented. These will be the baseline to determine how well the new application meets your business requirements and how the new application will impact current processes.

What will the project team do?

- Scope Management
The scope of the project should be defined before it begins (for example, will BOMs be changed as part of the implementation, will Service be implemented, etc).
- Communication
The project manager must coordinate communication between team members to ensure that all parties know what is expected of them and when tasks / assignments are due.
- Risk Management
If the scope of the project changes, determine the associated risk (will the timeline or budget be affected).
- Business Process Impact Analysis
Determine how business processes will change with the new application (tasks may no longer be required or work flows may changes)

Process Ownership

The core team should take ownership of their functional areas. This ownership encompasses communication, coordination with subject matter experts (SME), and using their insights to identify how new functionality or processes will affect other departments and/or business processes.

How will the project team achieve a successful implementation?

Functional Overview Training

This is the initial, guided tour through the application for the core team. It facilitates several activities – learning about the new application, identifying/documenting high-level gaps, identifying/documenting business process changes, and more. . .

Formal Training

During this phase, each functional area receives formal training. It normally includes key users who are part of the implementation team and are subject matter experts (SME). Formal training should include hands-on workshops.

Pilot Testing

This is one of the most significant areas of the implementation and is conducted at two levels: 1) functional area, 2) cross functional teams. It allows testing new functionality, identifying business processes changes, proposing solutions, validating proposed business processes changes, and more.

Documentation

One of the most valuable tools that the implementation team can have is documentation that is customized to fit your business environment. Normally, this is accomplished by each functional team validating and documenting their business processes through the testing phase. Standard INFOR documentation can be incorporated into this to make comprehensive user documentation guides.

Data Migration

‘Clean’ data is another of the more significant requirements to a successful data migration. The data migrations should be coordinated with pilot testing and user training.

User Training

This step is generally at the end of the implementation process, shortly before go-live. This training should be conducted by the implementation team using the documentation created by the implementation teams. User training is best conducted after all business processes have been tested and validated, and after all customizations are in place.

In all the areas mentioned above, there are multiple approaches to make them work best in your business environment. Please contact one of SSG’s implementation consultants to discuss details on the different approaches and methodologies.

Here is a summary of what you need for a successful implementation project

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| <ul style="list-style-type: none">• Planning and Management• Execution of the Plan• Project Focus• Dedicated Resources |
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For questions or assistance on an implementation project, please contact us at:

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