ERP Readiness Checklist

About the Checklist

For companies of all sizes, ERP readiness boils down to these six pillars:

- Leadership and Team Readiness
- Financial Readiness
- Data Readiness
- Process Readiness
- Technical Readiness
- Change Management and Risk Assessment

This checklist is designed to help you look "under the hood" of your business and get honest answers about where you stand when it comes to ERP implementation readiness.

How to use the checklist?

Scroll down and answer each question honestly. Identify potential roadblocks early, receive the clarity you need, and move forward with confidence. Alternatively, pause and prepare where it matters most.

This assessment takes less than **10 minutes to read**, but the clarity it provides will put you **10 steps ahead** of the competition.

If you'd rather have a professional eye on your operations, Glorium Technologies is here to help.

Get expert readiness assessments and end-to-end implementation services.

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ERP Readiness Checklist

Leadership and Team Readiness

You can easily accumulate a budget to buy the software, but a culture change must be built. Does your team have bandwidth for the transition?

Team Readiness

- [ ] Have you appointed a dedicated Project Lead for the ERP implementation project?
- [ ] Have you identified "Owners" for every department?
- [ ] Do your Process Owners understand how their work affects other departments?
- [ ] Is the "Front-Line" team comfortable with modern technology?
- [ ] Have you identified who will be your "In-House Experts," or do you require external help?

Are some questions difficult to answer? Do you need further clarification? Please do not hesitate to contact us. No further obligations. Talk to Our Experts Today

Leadership Readiness

- [ ] Is there a high-level "Executive Sponsor" driving this project?
- [ ] Has a realistic budget range been formally approved?
- [ ] Is the "Success Date" agreed upon?
- [ ] Have you defined the "Payback Period"?
- [ ] Is the leadership team prepared to lead by example?
- [ ] Do you have a "Crisis Protocol" for big decisions?
- [ ] Is there an "Exit Strategy" for the old system?

Business Case Clarity

- [ ] Have you documented your "Top 5 Pains"?
- [ ] Are your KPIs selected and baseline measured?
- [ ] Have you estimated the actual financial value of this change?
- [ ] Are the "Success Criteria" clearly defined?
- [ ] Is there a formal "Out of Scope" list?
- [ ] Have you prioritized your objectives by phase?
- [ ] Is everyone aligned on the "Standard-First" principle?
- [ ] Is the business case shared with the implementation team?

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Financial Readiness

You can easily accumulate a budget to buy the software, but a culture change must be built. Does your team have bandwidth for the transition?

- [ ] Are the recurring software licenses and subscriptions clear?
- [ ] Has the implementation partner provided a detailed services quote?
- [ ] Have you accounted for "Marketplace" add-ons?
- [ ] Is there a budget for internal "Backfill" or Overtime?
- [ ] Have you set aside funds for training and testing environments?
- [ ] Is there a "Post-Go-Live" optimization fund?
- [ ] Have you budgeted for Data Migration and Cleanup?
- [ ] Are the hardware and infrastructure costs included?
- [ ] Do you have a "Contingency Buffer" (15–20%)?

Timeline Assumptions

- [ ] Is the "Phase 1" scope locked and signed off?
- [ ] Does the estimated duration actually match the scope?
- [ ] Have you flagged the "High-Risk" items?
- [ ] Is there a "Time Buffer" for the unexpected?
- [ ] Have you chosen a specific "Phasing Strategy"?
- [ ] Have you checked for "Blackout Dates" in your calendar?
- [ ] Is there a "Gatekeeper" for new requests?
- [ ] Are external dependencies documented?

Data Readiness

Moving into a new ERP is like moving into a new house—you don't want to bring your old clutter with you. Is your data "migration-ready," or is it just a collection of spreadsheets?

- [ ] Has a "Data Audit" been performed across all domains?
- [ ] Are your "Data Stewards" assigned?
- [ ] Do you have a "Data Health Scorecard"?
- [ ] Have you identified the "Gaps"?
- [ ] Is there a plan for "Conflicting Sources"?
- [ ] Have you defined your Data History requirements?
- [ ] Is the "Old to New" mapping complete?
- [ ] Is a "Mock Load" on the calendar?
- [ ] Is the "Cutover Plan" drafted?

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Process Readiness

An ERP runs your workflows. Are your processes defined enough to be "taught" to a computer, and does your team have the breathing room to do the teaching?

- [ ] Are your "As-Is" workflows actually documented?
- [ ] Have you drafted your "To-Be" workflows?
- [ ] Are your "Known Exceptions" captured?
- [ ] Have you identified cross-department dependencies?
- [ ] Have you captured your "Non-Functional" needs?
- [ ] Are your SMEs actually available?
- [ ] Is the "Backfill Plan" in place?
- [ ] Are the "Rules of Engagement" set for the team?
- [ ] Have you checked the holiday calendar?

Technical Readiness

The digital foundation must be solid to support a modern ERP. Have you mapped out the foundation of your data and the stability of your systems?

Systems and Integrations

- [ ] Is your current system list comprehensive (including QuickBooks, Shopify, 3PL, WMS, etc., and Payment Service Providers)?
- [ ] Have you categorized your integration priorities between "must-haves" for launch and "nice-to-haves" for later?
- [ ] Have you reviewed your technical options for connecting systems? (APIs, Webhooks, or iPaaS)
- [ ] Are your EDI requirements for retailers like Amazon or major suppliers fully identified?
- [ ] Is integration ownership defined so you know exactly which system is the "Source of Truth?"
- [ ] Do you have a defined approach for monitoring interface errors?
- [ ] Are the performance requirements for latency, frequency, and batch sizes documented for every integration?
- [ ] Is the retry logic and error-alerting protocol documented for each connection?

Infrastructure

- [ ] Have you agreed on a Cloud vs. On-Premise hosting preference?
- [ ] Have you defined your specific data residency requirements?
- [ ] Are your security expectations for MFA encryption and audit logs defined?
- [ ] Do you have an agreed-upon environment strategy that includes separate Dev, Test, UAT, and Production instances?
- [ ] Are your Disaster Recovery targets for RPO and RTO formally defined?
- [ ] Is there a named technical owner responsible for managing environments, user access, and system upgrades?
- [ ] Have you planned for peak load testing?

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Security and Compliance

- [ ] Have you drafted a formal identity and access concept that defines user roles, permission groups, and requirements for SSO and MFA?
- [ ] Are all of your regulatory compliance needs (GDPR, SOX, ISO, or industry-specific standards like FDA/MDR) formally listed and accounted for?
- [ ] Have you defined your logging and audit requirements?

Change Management and Risk Assessment

Have you prepared your team for the specific ways their daily work life is about to change?

Communication

- [ ] Have you shared the project goals with the entire staff and briefed department heads?
- [ ] Have you identified exactly how the new system impacts each department?
- [ ] Is there a defined communication cadence?
- [ ] Have you clearly documented "what changes for me" for every role?

Training Preparation

- [ ] Have you selected your training formats and identified which SOPs need to be created?
- [ ] Have you identified early super-users and prepared a demo database?
- [ ] Is there a plan to train your super-users significantly earlier than the general user base?
- [ ] Do you have a plan for refresher courses and onboarding new hires (beyond pre-go-live)?

Adoption Readiness

- [ ] Have you defined adoption KPIs (login %, task completion, error rate) and linked them directly to business goals?
- [ ] Are your support channels (Slack/Teams, help desk) fully planned and ready for user questions?
- [ ] Is there an explicit plan for "floor support" to assist users during the first few weeks of launch?
- [ ] Have you set firm cutoff dates for decommissioning legacy tools?

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Risk Assessment

High-Risk Indicators

- [ ] Have you flagged risks like limited SME availability, poor data quality, or high pressure for system customization?
- [ ] Are there unresolved edge cases for marketplace apps or tax automation that could stall the build?
- [ ] Is your change management budget sufficient, and have you assessed the stability of your implementation partner's team?
- [ ] Are there conflicting strategic initiatives, such as a merger or a warehouse move, happening at the same time?
- [ ] Does the project rely too heavily on one or two "heroes" who represent single points of failure?
- [ ] Is there an aggressive, fixed deadline with no option to defer features to a second phase?

Mitigations

- [ ] Is a formal "Scope Freeze" in place to prevent new features from being added mid-project?
- [ ] Are you maintaining a weekly decision log and a formal risk register for review in every steering meeting?
- [ ] Have you started early data cleanup and set clear guardrails to limit expensive software customizations?
- [ ] Are there agreed-upon SLAs for how quickly leadership must decide on scope, budget, or timeline escalations?
- [ ] Is there a scheduled "reality check" every 4–6 weeks to compare the remaining scope against your team's actual capacity?

Final Readiness Score

Once you've completed the assessment, count the total number of "yes" checkmarks across all sections and see where your organization stands.

- 55-70+ Checks: Your foundation is strong. You have high alignment and clear documentation. You are ready to engage an implementation partner and begin the build phase.
- 35-54 Checks: You have a solid start, but there are still some "blind spots." You must first address these gaps and then proceed.
- Below 35 Checks: Your business is not yet ready. We recommend pausing to focus on the "Preparation Phase."

What’s Next? Partnering for Success

Whether you discovered critical gaps that need closing or confirmed that your organization is ready for liftoff, the next step is the most important: choosing the right partner to lead the build.

The Path Forward with Glorium Technologies:

- **If you scored high**, you've done the heavy lifting of preparation. Now you need a technical partner who can match your speed.
- **If you found gaps**, you've saved yourself from a costly mistake. We can help you bridge the distance between your current state and a successful launch.

Explore Our Customers’ Success Stories

90% Faster Reporting for Food Manufacturer via Odoo 18



Core Technologies:

Case Study Details ›

90% Inventory Accuracy and Cuts Stock Loss via Odoo 18



Core Technologies:

Case Study Details ›

Reduced Waste by 25% Using Dynamics 365 Business Central



Core Technologies:

Case Study Details ›

The cost of a failed ERP implementation is far higher than the cost of doing it right the first time.

Ready to Turn this Checklist into a Competitive Advantage?

Talk to Our ERP Experts Today