ERP readiness checklist

Work through this before an ERP project starts. Nothing here needs to be perfect: it shows where the gaps are, and the discovery stage fills them.

COMPANY / GROUP NAME	PROJECT OWNER & PHONE	TARGET GO-LIVE MONTH	CURRENT REGISTERS / SOFTWARE

01 People

- [ ] Name one owner who can make decisions for the project
- [ ] List the people who will use the system, by role
- [ ] Pick two or three staff who will test it before go-live
- [ ] Agree who signs off each stage

02 Documents and routines

- [ ] Collect a sample of every form, register and report you use today
- [ ] Write down your approval steps: who approves what, and above which amount
- [ ] Note the documents customers and suppliers send you
- [ ] List the reports the owner looks at each week and each month

03 Data

- [ ] Export your customer, supplier and item lists
- [ ] Decide the date your opening balances will be taken from
- [ ] Find out where stock counts and balances are kept today
- [ ] Mark which old records must come across and which can stay behind

04 Infrastructure

- [ ] Decide between our hosted cloud and your own server
- [ ] Check internet reliability at each site
- [ ] List the hardware to connect: scanners, printers, weighbridges, sensors
- [ ] Note how many computers and phones will use the system

05 Go-live

- [ ] Choose a quiet period for the switch
- [ ] Plan a short period of running old and new side by side
- [ ] Book training time for each group of users
- [ ] Agree how problems are reported after go-live

06 Priority notes & sign-off

Note urgent gaps, exceptions or dates to highlight during review:

Reviewed by: _____ Date: ___ / ___ / 20___

Next step: Once ticked, bring this sheet to a 30-minute scoping call at umaish.com/book or attach it at umaish.com/contact.

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