FREE TEMPLATE

ERP implementation readiness checklist.

Fill in every section before kickoff. If you can't write down a name, a date, or a list for a line, that's the gap to close first.

COMPANY

PREPARED BY

IMPLEMENTATION OWNER

TARGET CUTOVER DATE

01 Systems vs process

Write down the three to five problems the ERP needs to solve, and move anything an SOP would fix onto a separate process list.

Write down: The three to five problems the ERP must solve, and your separate process list.

02 Cross-team buy-in

Have each affected team (ecommerce, operations, finance, CX, wholesale) document its own challenges and what it needs solved.

Write down: Each team, who documented its challenges, and where that document lives.

03 Timing

Choose a date or a specific window that avoids peak, marketplace launches, and big-box retail onboarding.

Write down: Your cutover date or window, and the dates you are working around.

04 ## Owner and team

Name one owner, a small core team, and a backup for each core team member.

Write down: Owner, core team members, and the backup for each.

05 ## Calendars

Map holidays and PTO for the core team across the whole timeline, including the cutover week.

Write down: Holidays, long weekends, and PTO that fall inside the timeline.

06 ## 3PLs

Notify your 3PLs in writing, and open integration threads between them and your ERP vendor early.

Write down: Each 3PL, the date you notified them, their notice period, and the integration contact.

07 ## Contracts

List every contract on the order-to-cash path with its renewal and termination dates.

Write down: Each contract, its renewal date, and its termination notice window.

08 What's next

List the next six to twelve months of planned change, and mark each item as day-one or later.

Write down: Each planned change, marked day-one or later.

09 Data

Clean and reconcile your SKUs, packs, costs, and locations before migration starts.

Write down: Who owns the cleanup, the reconcile date, and how open POs, wholesale orders, and in-transit stock will be handled at cutover.

10 Discovery

Get the scoping questions in advance, assign each section to the person who owns that area, and plan which workstreams can run in parallel.

Write down: Each scoping section and its owner, and which workstreams run in parallel.

11 Dual-run and close

Budget time for dual-running and a slower first month-end close.

Write down: How long you will dual-run, your first close date, and who knows the old payout and COGS path.

Read the full guide behind each item: https://www.fulfil.io/blog/how-do-i-prepare-for-an-erp-implementation-so-it-goes-smoothly/