CHECKLIST

10 Questions Before an ERP Project

Most ERP projects do not fail because of the software, but because of questions nobody asked beforehand. Go through these ten points with your management team before requesting quotations. Wherever you have no clear answer, that is your first task.

Goals and Scope

- [ ] 01 **What problem should the ERP system solve?**
  Write down two or three concrete goals, such as “quotations in 10 instead of 40 minutes” or “stock levels always up to date”. “Becoming more modern” is not a goal.

- [ ] 02 **Which areas belong in the first stage?**
  Start with the core process that hurts most. Introducing everything at once overwhelms the team.

- [ ] 03 **How much budget and time is realistically available?**
  Besides licences, include implementation, data migration, training and the internal time of your employees.

Processes and Data

- [ ] 04 **How do your core processes really work today?**
  Including all spreadsheets, notes and verbal agreements. Only if you know the current state can you plan the target state sensibly.

- [ ] 05 **Which processes are truly special?**
  Separate what defines your business from what has just “always been done that way”. For the latter, the software standard is usually enough.

- [ ] 06 **What condition is your master data in?**
  Products, customers, suppliers, bills of materials: duplicates and outdated entries cost a lot of time during migration. Clean up early.

- [ ] 07 **Which systems must stay connected?**
  Accounting or your accountant, webshop, machines, banks, shipping providers: list all interfaces.

People and Partners

- [ ] 08 **Who is responsible internally, and does this person have time for it?**

  An ERP project needs an in-house project lead who is allowed to make decisions and is freed up for the task.

- [ ] 09 **How will you involve the future users?**

  Those who carry out the process every day should help shape it. This saves persuasion and workarounds later.

- [ ] 10 **How do you recognise the right partner?**

  Do they ask about your processes first, or show features right away? Do they know your industry? Who supports you after go-live?

Tip: Ask vendors to demonstrate the software using two or three of your real examples instead of a standard presentation. You will quickly see how well the standard fits you.

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