

Enterprise Resource Planning Software Checklist

By Adam Hughes

- Assemble an Enterprise Resource Planning Software Selection Team**
 - Upper management** At least one representative from company leadership.
 - Business unit leaders** Front-line managers who will use the software.
 - Technical staff** Members of your IT department, who will assist with implementation.
 - Subject matter experts** Heavy ERP users from each business unit.
 - Third-party oversight** Someone from within the company who is not directly involved with the ERP.
- Determine the Scope of Your Project**
 - Budget** How much can you spend?
 - Timeline** What is your deadline for selecting and implementing an ERP?
 - Criticality** Does your business require a new ERP, or is it optional?
- Evaluate Your Organization**
 - Size** How many employees does your organization have?
 - Structure** What business units make up your business?
 - Revenue** How much money does your company make in a year?
 - Growth outlook** Do you expect revenue to increase in coming years?
 - Process** Are there business processes that you need to modify?
- Evaluate Your Business Needs**
 - Current software** What ERP do you currently use?
 - Strengths** What does your current software do well?
 - Deficiencies** What critical needs does your current software not meet?
 - Future** What special features will you need in coming years?
 - Decide which specific functionalities your organization requires in its ERP:**
 - Customer Services (CRM)**
 - Sales**
 - Procurement (SRM)**
 - Production (PLM)**
 - Distribution (SCM)**
 - Accounting**
 - Human Resources**

- Governance
- Business Intelligence
- Asset Management
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- Evaluate Your Software Users
 - User base** How many people will be using the enterprise resource planning software?
 - Tech savvy** Will your staff require extensive training?
 - Transparency** Will upper management be using the software?
 - Reporting** What level of data access will your users need?
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- Evaluate Potential Enterprise Resource Planning Software Solutions
 - Initial cost** How much will the software and licenses cost?
 - Training** How much does it cost and how is it delivered?
 - Expandability** Can you add users without incurring additional costs?
 - Technology** Is the software hosted, or does your company need servers and IT staff?
 - Update path** Does the license include all available updates?
 - Reporting** Does the software provide the reporting you need?
 - Integration** Can the software work with other applications?
 - Workflow** Will you need to change the way you do business to fit the software?

- Security** Does the ERP software support sound data security practices?
- Demos** Invite ERP vendors on-site for product demos.
- Try first** Will ERP vendors give you access to trial versions of their software?
- Bargain** Is the vendor willing to customize a solution to fit your budget?
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- Evaluate ERP Support**
 - Online** Does the enterprise resource planning software vendor provide a customer portal?
 - Email** Can you ask for help via email?
 - Phone** Does the vendor maintain a live help desk?
 - Community** Is there an online community of users for each potential ERP?
 - Customers** Are there other organizations like yours who use the ERP?
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