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

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- ☐ 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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