

# ERP IMPLEMENTATION CHECKLIST

A practical planning tool for Kenyan small and medium-sized businesses

**Purpose:** Use this checklist to prepare your team, assess readiness, and track key activities before, during and after ERP implementation. Adapt it to your business, ERP scope and implementation partner's agreed plan.

## Project details

|                                        |       |
|----------------------------------------|-------|
| Business / organisation:               | _____ |
| Project sponsor:                       | _____ |
| Project manager:                       | _____ |
| ERP solution / implementation partner: | _____ |
| Target go-live date:                   | _____ |

## 1. Define objectives and requirements

- Document the business problems the ERP should solve.
- Set measurable success indicators and record current baseline performance.
- Consult the departments and employees who will use the system.
- Separate essential requirements from optional features.
- Agree on the project scope and what is outside scope.

## 2. Establish project ownership

- Appoint an executive sponsor and an internal project manager.
- Assign departmental process owners and decision-makers.
- Agree on roles, approval routes and escalation procedures.
- Reserve staff time for workshops, testing, data preparation and training.
- Set regular project meetings and a decision log.

## 3. Map and improve business processes

- Document current finance, sales, procurement, inventory and operational workflows as relevant.
- Identify duplicated data entry, manual work, bottlenecks and control gaps.
- Agree on future-state workflows before configuration.
- Record required reports, approvals and exceptions.
- Justify customisation against standard ERP functionality.

## 4. Confirm budget and commercial terms

- Request an itemised proposal covering licences or subscriptions and implementation services.
- Account for data migration, integrations, customisation, training and support.

- Identify recurring charges, exclusions, assumptions and change-request costs.
- Budget for internal staff time and a contingency appropriate to project risk.
- Agree on payment milestones, deliverables and acceptance criteria.

## 5. Select the ERP and implementation partner

- Evaluate solutions against documented business requirements.
- Test realistic scenarios in a product demonstration.
- Assess security, access controls, backup, scalability and deployment options.
- Confirm required integrations and local tax or e-invoicing workflows, including eTIMS where applicable.
- Agree on implementation methodology, responsibilities, support and service expectations.

## 6. Clean and prepare data

- List data sources and records to be migrated.
- Remove duplicates and correct incomplete or inconsistent records.
- Validate customer, supplier, product and inventory data.
- Agree which historical records will move and which will remain accessible in legacy systems.
- Test migration and reconcile opening balances and record counts before approval.

## 7. Configure and integrate

- Review configuration against approved workflows and requirements.
- Set up user roles, permissions, approval rules and reports.
- Document each integration, its owner and expected data flow.
- Test connected systems and define how errors will be detected and resolved.
- Record configuration decisions and any approved custom development.

## 8. Train users and prepare for change

- Create role-based training plans and materials.
- Explain what is changing, why it matters and how employees will be supported.
- Run hands-on exercises using realistic business scenarios.
- Identify departmental champions and support contacts.
- Confirm that key users can complete their tasks before go-live.

## 9. Test and approve go-live

- Test end-to-end processes, including exceptions and approval controls.
- Verify financial reports, stock balances, migrated data and integrations.
- Track defects, owners, severity and resolution status.
- Confirm backups, recovery arrangements, cutover steps and contingency plans.
- Obtain formal go-live approval from authorised business owners.

## 10. Support, measure and improve

- Provide enhanced support during the initial go-live period.
- Monitor adoption, transaction accuracy and user-reported issues.
- Compare results with the baseline measures defined at project start.
- Review access permissions, backup success and support arrangements.

- Prioritise improvements based on business value, cost and risk.

# Go-live readiness review

Complete this review with the project team before approving the launch.

| Area               | Readiness confirmation                                                      | Status                                                                   |
|--------------------|-----------------------------------------------------------------------------|--------------------------------------------------------------------------|
| Business processes | Critical workflows have been tested and business owners have approved them. | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Data               | Migration has been reconciled and opening balances have been approved.      | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Users              | Key users have completed role-based training and know where to get support. | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Integrations       | Required integrations have been tested, including error handling.           | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Security           | User access and permissions have been reviewed.                             | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Continuity         | Backup, recovery and contingency arrangements are documented.               | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Support            | Support contacts, escalation routes and response expectations are clear.    | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Cutover            | Cutover steps, responsibilities and timing are agreed.                      | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Reporting          | Critical operational and financial reports have been checked.               | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |
| Approval           | Authorised business owners have approved go-live.                           | <input type="checkbox"/> Ready<br><input type="checkbox"/> Action needed |

## Key risks and decisions

Open issues / risks: \_\_\_\_\_

Decision owner: \_\_\_\_\_

Required action and due date:  
\_\_\_\_\_

Go-live approval date: \_\_\_\_\_

## Need help planning your ERP project?

Genome Technologies Ltd (GTL) works with businesses to assess ERP requirements and plan implementation activities. Discuss your business needs, scope, data migration, integrations, training and support arrangements with your ERP provider.

**Website:** <https://www.gtl.co.ke/>

This checklist is a planning aid, not a substitute for project-specific technical, financial, legal or tax advice. Confirm applicable compliance requirements with your advisers and implementation partner.