

Quick ERP Migration Checklist

Planning & Strategy

- ☐ Define objectives and KPIs
- ☐ Set scope and priorities
- ☐ Assemble migration team
- ☐ Select migration tools
- ☐ Create timeline with milestones

Migration & Testing

- ☐ Configure new ERP system
- ☐ Migrate data in phases
- ☐ Test with small datasets first
- ☐ Validate migrated data accuracy
- ☐ Simulate real-world scenarios

Data Preparation

- ☐ Audit all data sources
- ☐ Cleanse and standardize records
- ☐ Map fields to new ERP structure
- ☐ Establish governance policies
- ☐ Backup legacy data

Go-Live & Post-Migration

- ☐ Train users with role-based sessions
- ☐ Launch ERP system in production
- ☐ Provide ongoing support
- ☐ Conduct post-migration audit
- ☐ Optimize continuously with analytics