



ERP System Upgrade Checklist

The clock is ticking... The maintenance date is approaching... The system support is coming to end of life. The ERP System Upgrade is now top of mind. But what is the best way to prepare for such a daunting undertaking? There are several things you can do to help ease the pain that comes from any type of an ERP project. The following are just a few tips, so you do not completely lose your mind.



DEDICATED PROJECT TEAM

- This team should include Subject Matter Experts (SMEs), End Users for testing, and a Project Sponsor. It is critical to the success of your project to get the right players involved from the beginning, to provide Project Oversight or Leadership, Governance, and Accountability (LGA).

This is where a neutral third party can be of great assistance in leading your team, by providing an experienced Project Leader who holds all stakeholders accountable and ensures contract alignment.

- The Project Sponsor should be heavily invested in the project, so you have top-down support to drive success and stakeholder involvement. The absence of this support can be the cause of failure.
- Schedule regular check-ins with your team to ensure all their tasks are being completed.
- Use your team to drive project momentum throughout the organization.



ADEQUATE PREPARATION

- Verify all project requirements.
- Be certain your current processes have been reviewed and are validated.
- Start working on data cleansing. This is your chance to eliminate bad data. Remember garbage in = garbage out.
- Begin thinking about system configuration. Are there new areas you can utilize now that were not part of the prior version?
- Ensure you have good backups of the existing system. You never know when they might be needed!



PROPER PLANNING

- Know when your current support expires; walk backward to create a realistic project plan.
- Be sure you have access to your old system after the upgrade. You do not want to lose it before you are ready to go live with the new system.
- Socialize the upgrade project around the company to get employees on board with any potential changes: Organizational Change Management.
- During execution and testing, get the right people in the room: Role Sorting.



SUFFICIENT TESTING

- This element cannot be stressed enough! Proper testing = Successful upgrade.
- Make sure you are testing end-to-end and through all integrations.
- When going through data conversion, include enough sample data to test through your processes completely.
- Write test scripts and use cases based on real life scenarios that occur on a daily, monthly, and yearly basis.
- Can your users say the following with certainty? "I am confident that I can perform each of my applicable job duties within the new system."



SEAMLESS CUTOVER

- Confirm you have a detailed cutover plan.
- Do not plan anything else for this timeframe. The sole focus should be on the system upgrade.
- Ensure proper resources are available from your company, the solution provider, and any other key players (EX: Independent Software Vendors (ISVs), External IT).
- Once the cutover is complete, eliminate access to the old system except for a small group of SMEs. This is just for a backup plan.
- Make sure you have Post Go-Live Support readily available.

Contact MSSBTA to learn how we can improve your organization's ERP System Upgrade and ensure future success.

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