

# 10-Point ERP Implementation Audit Checklist

## Bluechip Solutions | ERP Readiness & Implementation Guide

Use this checklist to assess business readiness before implementing or upgrading an ERP system. It focuses on requirements, workflow mapping, data migration, team readiness, testing, budgeting, and go-live preparation.

| #  | Audit Area                        | What to Check                                                                                                           | Ready When...                                                        |
|----|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| 1  | <b>Business Requirements</b>      | Identify business goals, pain points, departments, locations, and ERP expectations.                                     | Requirements are documented and approved by key stakeholders.        |
| 2  | <b>Workflow Mapping</b>           | Map sales, purchase, inventory, production, finance, HR, reporting, and approval processes.                             | Current and future workflows are clearly defined.                    |
| 3  | <b>Data Migration</b>             | Review customer, supplier, product, inventory, accounting, employee, and historical transaction data.                   | Data is cleaned, validated, deduplicated, and migration-tested.      |
| 4  | <b>Internal Team Readiness</b>    | Identify ERP champions, department owners, administrators, and end users.                                               | Roles are assigned and employees understand the implementation plan. |
| 5  | <b>ERP Configuration</b>          | Configure modules, approval rules, taxation, workflows, dashboards, permissions, and reports.                           | Configuration matches approved business requirements.                |
| 6  | <b>Integration Readiness</b>      | Check accounting, CRM, payroll, banking, e-commerce, APIs, SMS/email, and other required integrations.                  | Required integrations are tested successfully.                       |
| 7  | <b>User Training</b>              | Train employees according to their roles using practical, process-based scenarios.                                      | Users can complete key daily tasks independently.                    |
| 8  | <b>Testing &amp; Validation</b>   | Conduct unit, integration, data, security, workflow, and user acceptance testing.                                       | Critical workflows pass UAT without unresolved high-priority issues. |
| 9  | <b>Budget &amp; Resources</b>     | Calculate software, implementation, customization, migration, training, integration, infrastructure, and support costs. | Total ERP budget and internal resources are approved.                |
| 10 | <b>Go-Live &amp; Support Plan</b> | Define go-live date, backup/rollback plan, support responsibilities, KPIs, and post-launch monitoring.                  | Management has approved the go-live and support plan.                |

## Pre-Implementation Questions

### Data Migration

- Is our existing data accurate and ready for migration?
- What historical data needs to be transferred?
- Has a test migration been completed?

### Internal Team Readiness

- Who will own the ERP implementation?
- Have department heads and end users been involved?
- Is training scheduled before go-live?

### Workflow Mapping

- Are current processes documented?
- Which processes should be automated?
- Are approval workflows clearly defined?

### Budgeting

- Have we calculated the total cost of ERP implementation, not just the software price?
- Have customization, integration, migration, training, and support costs been considered?
- Is there a contingency budget?

## ERP Readiness Summary

A successful ERP implementation depends on more than selecting software. Businesses should align requirements, workflows, people, data, technology, testing, and budget before go-live. This checklist can be used as a practical pre-implementation review for Bluechip Solutions ERP projects.

## Suggested SEO Focus

**Primary keyword:** ERP implementation checklist

**Secondary keywords:** ERP implementation process, ERP data migration, ERP workflow mapping, ERP implementation cost, ERP readiness checklist