

PLANNING GUIDE

Before you select an ERP

A short planning guide for the processes, data, integrations and ownership decisions that should shape an ERP evaluation.

Set the business boundaries

Which entities, locations, teams and processes are in scope? Who owns purchasing, stock, master data and financial approvals? Which exceptions must the future process handle?

Prepare the evidence

Collect representative transactions and reports. Identify source systems, data quality concerns, volumes, interfaces and historical data needs. Build demonstration scenarios that reflect a full business cycle.

Compare the full commitment

Ask what is standard, what is configured and what needs an extension. Compare migration, integration, training, licensing and support as well as the application. Agree acceptance criteria and the responsibilities for the first operating cycle.

Use these questions as a starting point and review the requirements with your organisation's responsible teams and specialists.