

ERP Implementation Guide

August 2025



— We close your GAP with Odoo

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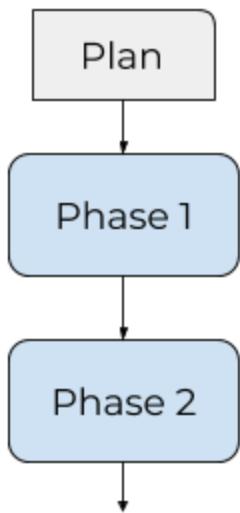
The essence of strategy is choosing what not to do

-- Michael Porter

The Plan

The most important part of any ERP implementation is to draft the best implementation plan. ERP implementation is not only configuration and development. The most important part is to understand the people and processes involved.

A phased approach is key to reducing the implementation risk and increasing the ROI. If you implement a first phase and then move to the next one, it means that you are earning value sooner, thus turning expense into an investment.



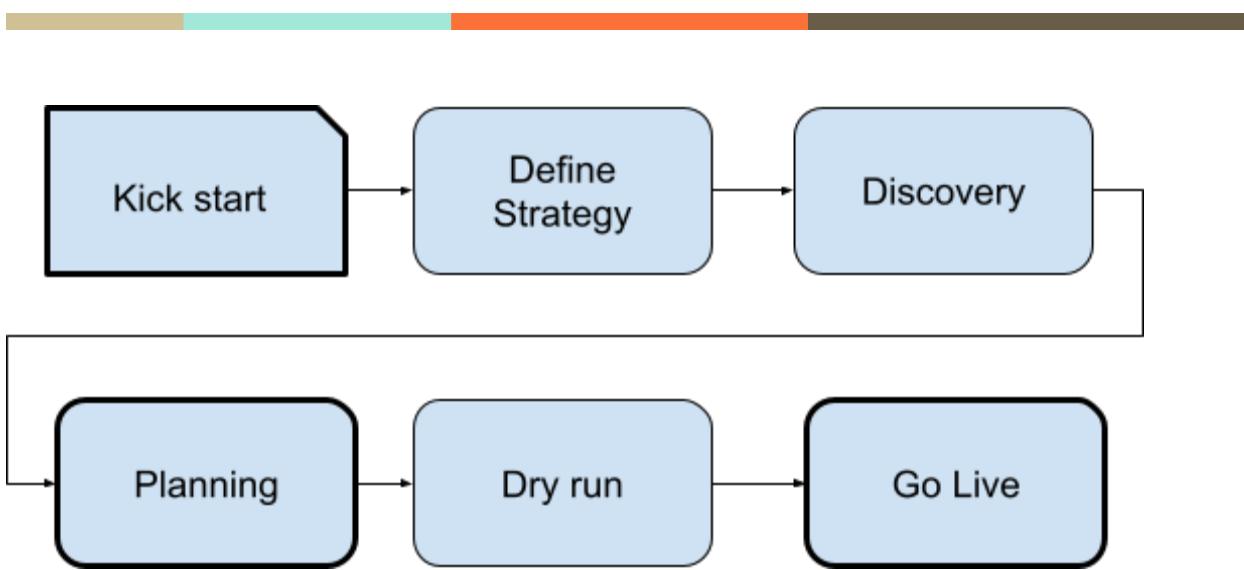
The way your users will start interacting with the new system needs to be planned. The most efficient way to achieve this is to find some business process that you can implement easily and that can target a significant group of employees.

Sometimes it's a process that will add value fast. This will allow some users to interact with the system and maybe reduce the learning curve because it will get the users acquainted with the basics of the system.

Then, the next phases are much harder to map as the processes are usually tightly connected to each other. To untangle these relationships you need to brainstorm with your team in order to find the best solution because this is a critical decision for the implementation success.

After you have the right plan in place, be ready to review it and reassess the need to change it. The nature and complexity of these projects usually require this revision process.

Involving the implementation consultant from the start will help avoid common pitfalls of the specific systems. It also ensures that you benefit from the experience of several other projects that they have surely been involved in.



These are the typical stages of the implementation process:

Kickstart – Align on goals, explain the implementation process, set expectations, establish communication channels, and define the roles of each team and member.

Go-Live Strategy – Design the overall approach by identifying quick wins, reviewing integration needs, and defining data import requirements.

Discovery – Dive deeper into your company's processes: review responsibilities, test product configurations, scope integrations, set up the chart of accounts, and often run a demo for the CFO or CPA to validate key decisions.

Planning – The most critical stage. Define the go-live date, map activities in detail, assign tasks and deadlines, re-evaluate the budget, and deliver user training. From here, formal progress reporting begins.

Dry Run – A rehearsal phase, usually a double-entry week, where the company operates both old and new systems in parallel. This allows us to collect user feedback, provide active training, and help staff map existing processes to the new workflows in Odoo.

Go-Live – Execute the transition with the correct maneuvers in Odoo, including stock adjustments and the creation of entry balances.



Hypercare Support – Immediately after go-live, we provide close support to ensure stability, resolve issues quickly, and reinforce user confidence in the new system.

Communication Flow

In order to successfully implement an ERP system in your company, you first need to establish the correct flows of communication inside your company and with the implementation partner.

At ERPGAP we usually request our customers to name a SPOC (Single Point of Contact) person that will centralize all the communication flowing to us and is mandated to make decisions on any project consideration. The SPOC is also the person that will organize the requirement gathering meetings or calls and will provide any information necessary.

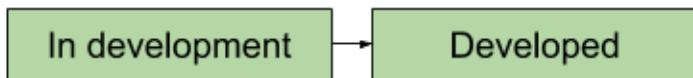
Since all topics will be debated, scoped, configured, tested and/or developed, the need for a Project Management System/Ticketing system is mandatory. These are the stages we follow to classify the developments and configurations we create in the project system:



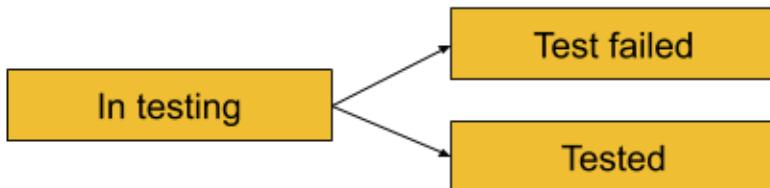
Specification Stage



Development Stage



Testing Stage



Any Stage



You will really have a difficult time trying to do this with MS Office and Emails only. At ERPGAP we offer access to our own project management platform, where they can access the export of all the information they have on our system.

Collecting Requirements

Collecting requirements also requires planning. There are several steps but the first will be to list the requirements. In order to do this we need to know the capabilities of the system we are implementing. Since exploring an ERP might be a complex task, better to ask assistance from your consultant.

While listing the requirements, you should categorize them by type and by critical level. The type is usually associated with the department of your company or per function e.g.: Sales, Inventory, Purchase, Manufacturing, Accounting, Marketing, etc. The critical level is usually associated with the need to implement the feature. We use the Odoo standard of 4 levels:

1. Nice to have
2. Included in Odoo
3. Can do manually - time consuming
4. Critical - can't do without

This will result in a spreadsheet like this one:

	A	B	C	D	
1	Sales and CRM				
3	ID	Description	Level		
4	1	Manage sales lead time	4		
5	2	Manage SO status based on status of MO and DO.	4		
6	3	Ability to update and manage due date	4		
7	4	Manage estimated date of arrival and expected date of arrival	2		
8	5	Change estimated and expected date of arrival	2		
9	6	Cancel existing order.	4		
10	7	Cannot cancel SO or SO line item if MO is in progress (without permission)	4		
11	8	Ability to have manager cancel an SO or SO line item if MO is in progress	4		
12					
13					
14					
15					
16					
17					
18					
19					
20	1 - Nice to have				
21	2 - Included in Odoo				
22	3 - Can do manually time consuming				
23	4 - Critical can't do without				
24					
25					
26					
	+ ≡	Sales ▾	Purchase ▾	Integration ▾	Inventory ▾



Now, having all these macro features listed we will try to move down all of the critical level 4 items to 3. This is in order to reduce the amount of customization we will need to do for the first stage and ERP to go live.

You will face hard decisions and that's really when you will be making real progress and making your implementation strategy smart and incisive. Keep the focus on the go live date and don't fall in the perfection trap.

Of course this is not the last requirement gathering because they will be collected with the level of detail needed according to the implementation plan.

Conclusion

While implementing an ERP system we should always try to implement and place it in production as soon as possible. Doing this, we will be able to give value to the users and also detect problems and receive feedback that will be useful for the rest of the project.

Avoid developing features unless you are sure they will bring value. If we are 100% sure they will bring value, we will delay the development anyway. In several situations we will come to the conclusion that what seems to be important ends up being solved in another way that is also acceptable.

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