

Odoo Implementation Readiness Assessment

Complete Self-Assessment Checklist

Use this comprehensive checklist to evaluate your organization's readiness for Odoo implementation. Score each section honestly to identify areas requiring attention before starting your implementation.

Executive Summary Scoring

Total Possible Points: 300

- **260-300 points:** Excellent readiness - Proceed with confidence
 - **220-259 points:** Good readiness - Address identified gaps first
 - **180-219 points:** Moderate readiness - Significant preparation needed
 - **Below 180 points:** High risk - Delay implementation until core issues resolved
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Section 1: Organizational Readiness (100 Points)

Leadership and Commitment (25 Points)

Executive Sponsorship

- ☐ **5 pts:** CEO/Owner personally committed to implementation success
- ☐ **4 pts:** Clear executive sponsor identified with decision-making authority
- ☐ **3 pts:** Senior management understands implementation scope and timeline
- ☐ **2 pts:** Budget formally approved and protected for implementation
- ☐ **1 pt:** Project charter signed and communicated organization-wide

Scoring: ___/25 points

Change Management Capability (25 Points)

Organizational Change History

- ☐ **5 pts:** Track record of successful technology implementations
- ☐ **4 pts:** Change management processes and experience in place
- ☐ **3 pts:** Communication channels effective across all departments
- ☐ **2 pts:** Training and development programs successfully executed
- ☐ **1 pt:** Resistance to change typically managed effectively

Scoring: ___/25 points

Resource Allocation (25 Points)

Human Resources

- ☐ **5 pts:** Dedicated project leader with 50%+ time allocation
- ☐ **4 pts:** Department representatives with 20%+ time allocation

- ☐ **3 pts:** Technical champion with database/systems experience
- ☐ **2 pts:** Executive sponsor with 10%+ time commitment
- ☐ **1 pt:** External consultant budget for specialized expertise

Scoring: ___/25 points

Timeline and Expectations (25 Points)

Project Realism

- ☐ **5 pts:** Realistic timeline allowing 6+ months for full implementation
- ☐ **4 pts:** Understanding that productivity may initially decrease
- ☐ **3 pts:** Go-live date flexible based on readiness rather than arbitrary
- ☐ **2 pts:** Expectations aligned with implementation complexity
- ☐ **1 pt:** Backup plans if implementation timeline extends

Scoring: ___/25 points

Section 1 Total: ___/100 points

Section 2: Business Process Readiness (75 Points)

Process Documentation (25 Points)

Current State Understanding

- ☐ **5 pts:** Current business processes documented and understood
- ☐ **4 pts:** Process owners identified for all major business areas
- ☐ **3 pts:** Pain points and inefficiencies clearly identified
- ☐ **2 pts:** Integration points between departments mapped
- ☐ **1 pt:** Regulatory and compliance requirements documented

Scoring: ___/25 points

Requirements Clarity (25 Points)

Business Requirements

- ☐ **5 pts:** Business requirements prioritized by importance and urgency
- ☐ **4 pts:** Distinction clear between requirements and nice-to-have features
- ☐ **3 pts:** Success criteria defined and measurable
- ☐ **2 pts:** Module selection based on actual business needs
- ☐ **1 pt:** Integration requirements with external systems identified

Scoring: ___/25 points

Process Flexibility (25 Points)

Adaptation Willingness

- ☐ **5 pts:** Willingness to adapt processes to leverage Odoo best practices

- ☐ **4 pts:** Understanding that some current processes may need modification
- ☐ **3 pts:** Openness to eliminating redundant or inefficient processes
- ☐ **2 pts:** Acceptance that perfect replication of current system isn't goal
- ☐ **1 pt:** Focus on business outcomes rather than feature matching

Scoring: ___/25 points

Section 2 Total: ___/75 points

Section 3: Technical Readiness (75 Points)

Infrastructure Capability (25 Points)

Technical Foundation

- ☐ **5 pts:** Server infrastructure sized appropriately for user load
- ☐ **4 pts:** Network connectivity reliable with adequate bandwidth
- ☐ **3 pts:** Backup and disaster recovery procedures in place
- ☐ **2 pts:** Security policies and access controls established
- ☐ **1 pt:** Integration capabilities with existing systems verified

Scoring: ___/25 points

Data Quality (25 Points)

Data Assessment

- ☐ **5 pts:** Data quality assessed with cleanup plan if needed
- ☐ **4 pts:** Data migration strategy developed and validated
- ☐ **3 pts:** Historical data requirements determined and documented
- ☐ **2 pts:** Data governance policies and procedures established
- ☐ **1 pt:** Master data management processes in place

Scoring: ___/25 points

Technical Expertise (25 Points)

Skills and Knowledge

- ☐ **5 pts:** Internal IT expertise available for ongoing system administration
- ☐ **4 pts:** Database management skills present or available
- ☐ **3 pts:** API integration experience within team or through partners
- ☐ **2 pts:** Basic Linux/server administration capabilities
- ☐ **1 pt:** Understanding of web-based application architecture

Scoring: ___/25 points

Section 3 Total: ___/75 points

Section 4: Financial and Resource Readiness (50 Points)

Budget Planning (25 Points)

Financial Preparation

- ☐ **5 pts:** Total cost of ownership calculated for 3-year period
- ☐ **4 pts:** Implementation budget includes 20% contingency
- ☐ **3 pts:** Ongoing operational costs (hosting, support, training) budgeted
- ☐ **2 pts:** ROI expectations realistic and measurable
- ☐ **1 pt:** Funding secured and not dependent on other projects

Scoring: ___/25 points

Vendor and Partner (25 Points)

Partnership Strategy

- ☐ **5 pts:** Implementation partner selected with proven Odoo expertise
- ☐ **4 pts:** Partner relationship and communication style confirmed
- ☐ **3 pts:** Scope of work and deliverables clearly defined
- ☐ **2 pts:** Support and maintenance strategy established
- ☐ **1 pt:** Escalation procedures and performance metrics agreed

Scoring: ___/25 points

Section 4 Total: ___/50 points

Risk Assessment Matrix

High-Risk Indicators (Immediate attention required)

Critical Risk Factors:

- ☐ Executive sponsor lacks authority to make decisions
- ☐ Budget insufficient for realistic implementation scope
- ☐ Technical expertise completely absent internally
- ☐ Data quality extremely poor with no cleanup plan
- ☐ Unrealistic timeline pressure (less than 3 months)
- ☐ Previous ERP implementation failures without lessons learned
- ☐ Major business process changes planned during implementation
- ☐ Key stakeholders actively resistant to change

Medium-Risk Indicators (Address before implementation)

Moderate Risk Factors:

- ☐ Limited change management experience
- ☐ Some data quality issues requiring cleanup
- ☐ Moderate customization requirements
- ☐ Resource availability concerns during peak business periods
- ☐ Integration complexity with multiple legacy systems

- ☐ Limited backup and disaster recovery procedures
- ☐ Compressed timeline with little flexibility
- ☐ Some stakeholder resistance requiring management

Success Accelerators (Leverage these strengths)

Positive Indicators:

- ☐ Strong executive sponsorship with clear commitment
 - ☐ Previous successful technology implementations
 - ☐ High-quality, well-organized data
 - ☐ Experienced internal IT team
 - ☐ Realistic timeline with adequate resources
 - ☐ Strong implementation partner relationship
 - ☐ Clear business requirements and success criteria
 - ☐ Organization-wide enthusiasm for improvement
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Readiness Improvement Recommendations

For Scores 180-219 (Moderate Readiness)

Priority Actions:

1. **Strengthen Executive Sponsorship:** Ensure clear commitment and authority
2. **Address Data Quality:** Implement data cleanup before migration
3. **Enhance Technical Capabilities:** Train internal team or secure additional expertise
4. **Develop Change Management:** Create communication and training plans
5. **Realistic Timeline:** Allow adequate time for proper implementation

For Scores Below 180 (High Risk)

Critical Prerequisites:

1. **Executive Alignment:** Secure genuine leadership commitment
 2. **Resource Adequacy:** Ensure sufficient budget and human resources
 3. **Technical Foundation:** Establish basic infrastructure and expertise
 4. **Process Preparation:** Document and optimize current business processes
 5. **Risk Mitigation:** Address identified high-risk factors before proceeding
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Implementation Go/No-Go Decision Framework

GREEN LIGHT (Proceed with Implementation)

- Score 220+ points overall
- No critical risk factors present
- Strong executive sponsorship confirmed
- Adequate resources and realistic timeline
- Technical foundation and data quality acceptable

YELLOW LIGHT (Proceed with Caution)

- Score 180-219 points overall
- Medium-risk factors identified and mitigation planned
- Some gaps in readiness but addressable
- Strong commitment to addressing identified issues
- Additional preparation time allocated

RED LIGHT (Delay Implementation)

- Score below 180 points overall
 - Critical risk factors present
 - Insufficient resources or unrealistic expectations
 - Major gaps in technical or organizational readiness
 - Lack of genuine commitment to change
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Next Steps Based on Assessment

Excellent Readiness (260-300 points)

1. Finalize implementation partner selection
2. Complete detailed project planning
3. Begin team formation and training
4. Initiate data preparation activities
5. Schedule implementation kick-off

Good Readiness (220-259 points)

1. Address identified gaps in scoring
2. Strengthen weaker assessment areas
3. Develop risk mitigation plans
4. Enhance team capabilities as needed
5. Proceed with careful monitoring

Moderate Readiness (180-219 points)

1. Focus on critical improvement areas
2. Delay implementation 2-3 months for preparation
3. Invest in team development and training
4. Strengthen executive sponsorship
5. Re-assess before proceeding

High Risk (Below 180 points)

1. Conduct executive leadership alignment session
2. Reassess business case and timing
3. Invest in organizational change management
4. Build technical capabilities

5. Consider alternative implementation approaches

This assessment is designed to provide honest feedback about implementation readiness. Use the results to strengthen your preparation and increase the probability of implementation success.

Assessment Date: _____

Assessed By: _____

Total Score: __/300 points

Recommendation: _____

Next Review Date: _____