

# Odoo Implementation Readiness Checklist

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*Complete phase-by-phase checklist for successful Odoo implementation*

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## Phase 1: Configuration Readiness Checklist

**Before moving to user training, ensure:**

- ☒ All core business processes configured and tested
- ☒ User permissions and security roles properly set
- ☒ Essential reports and dashboards created
- ☒ Data validation rules and workflows active
- ☒ Integration points tested and functional
- ☒ Customizations documented and approved
- ☒ Performance benchmarks established

*Remember: perfect configuration is the enemy of good configuration. Start with 80% of your requirements working smoothly, then iterate and improve based on real user feedback. A system that works well for most processes is infinitely better than a perfectly configured system that never gets deployed.*

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## Phase 2: Training & User Adoption Checklist

**Before go-live, verify:**

- ☒ All user groups have received role-appropriate training
- ☒ Power users are identified and fully competent
- ☒ Support procedures and escalation paths are established
- ☒ Mobile access is configured and tested
- ☒ Change management plan is active and monitored
- ☒ User acceptance testing is complete with sign-off
- ☒ Training materials and job aids are available

*Remember: training isn't a one-time event—it's an ongoing process. Plan for refresher training, new user onboarding, and continuous skill development. The most successful implementations treat training as an investment in long-term adoption and productivity, not a checkbox to complete before go-live.*

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## Phase 3: Post Go-Live Performance Checklist

**After 90 days post-go-live, verify:**

- ☒ System performance meets or exceeds baseline requirements
- ☒ User satisfaction scores above 8/10 for system usability
- ☒ All business processes operating at full efficiency
- ☒ Support ticket volume has stabilized at manageable levels
- ☒ Monitoring and optimization procedures are fully automated

- ☒ Future enhancement roadmap is defined and prioritized
- ☒ Team is prepared for ongoing system evolution and scaling

*Remember: go-live is just the beginning of your Odoo journey. The most successful implementations view the first 90 days as a period of rapid learning and optimization, not a time to declare victory. Your system will evolve with your business, and your investment in proper support and optimization processes will pay dividends for years to come.*

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## Phase 4: Pre-Implementation Planning Checklist

### Before starting your Odoo implementation, verify:

- ☒ Clear business objectives and success criteria defined
- ☒ Realistic timeline with adequate testing and training phases
- ☒ Experienced implementation partner with proven Odoo expertise
- ☒ Data quality assessment and cleanup plan completed
- ☒ Change management strategy addressing user adoption concerns
- ☒ Technical infrastructure sized appropriately for business needs
- ☒ Recovery and rollback procedures tested and documented

*Remember: implementation mistakes are expensive to fix after go-live, but they're completely preventable with proper planning and execution. The most successful Odoo implementations aren't the ones that never encounter problems—they're the ones that anticipate problems and have systems in place to resolve them quickly.*

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## Phase 5: Partner Selection & Team Building Checklist

### Before finalizing your implementation partner:

- ☒ Verified official certification and partnership status
- ☒ Confirmed industry-specific experience with similar companies
- ☒ Validated technical capabilities and methodology documentation
- ☒ Assessed communication style and cultural fit
- ☒ Reviewed detailed references from recent clients
- ☒ Established clear contract terms and performance expectations
- ☒ Defined ongoing support and relationship management processes

### Internal Team Readiness Checklist:

#### Before starting implementation:

- ☒ Executive sponsor committed and engaged
- ☒ Project leader identified with appropriate authority and skills
- ☒ Technical champion prepared for ongoing system administration
- ☒ Department representatives selected and trained
- ☒ Data steward prepared for migration and quality assurance
- ☒ Internal champions identified and development plan established
- ☒ Change management strategy developed and resourced

*Remember: the cheapest partner rarely delivers the best value, and the most expensive isn't always the best choice. Focus on finding partners who understand your business, communicate clearly, and demonstrate genuine commitment to your long-term success. Your implementation partner becomes an extension of your team—choose accordingly.*

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## Phase 6: Project Management & Quality Gates Checklist

**Before proceeding to the next phase, verify:**

- ☒ All milestone deliverables completed and approved
- ☒ Stakeholder sign-off obtained for phase completion
- ☒ Risk register updated with new issues and mitigations
- ☒ Budget and timeline variance within acceptable limits
- ☒ Team readiness verified for next phase activities
- ☒ Quality gates met with documented evidence
- ☒ Communication completed to all affected stakeholders

*Remember: methodology is a framework, not a straitjacket. The best implementations adapt methodology to fit business reality while maintaining the discipline and structure needed for predictable success. Your goal isn't perfect adherence to process—it's delivering a working system that improves business outcomes on time and on budget.*

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## Phase 7: Final Migration Readiness Checklist

**Before committing to any solution:**

- ☒ Current system limitations clearly documented and quantified
- ☒ Business requirements validated against alternative capabilities
- ☒ Technical resources and expertise assessed realistically
- ☒ Total cost of ownership calculated for 3-5 year timeline
- ☒ Implementation timeline and business disruption planned
- ☒ Change management and training requirements understood
- ☒ Integration requirements with existing systems defined

*Remember: the best ERP is the one that fits your business reality, not the one that looks best in demos. Sometimes that's Odoo, sometimes it's not. The key is making an informed decision based on honest assessment of your needs, capabilities, and constraints.*

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## How to Use This Checklist

### Phase Approach

1. **Use sequentially** - Complete each phase before moving to the next
2. **Review regularly** - Revisit previous phases as new information emerges
3. **Adapt as needed** - Modify checklist items to fit your specific business context

### Success Criteria

- **80% completion** minimum before proceeding to next phase
- **100% completion** of critical items (marked in bold if any)
- **Stakeholder sign-off** on each completed phase

## Quality Assurance

- Document evidence for each completed checklist item
- Conduct peer reviews for critical decisions
- Maintain audit trail of changes and decisions

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*This comprehensive checklist is part of the "Odoo Implementation Guide 2025: Avoid \$250K+ Failures" available at [AriaShaw.com](https://AriaShaw.com)*

**Questions or need help with implementation planning?** Contact us for expert guidance and support throughout your Odoo journey.