

# IMPLEMENTATION GUIDE: ERP migration at-a-glance

## PREPARATION

- ☐ **Scrutinize your own operations**
- ☐ **Get buy-in and support from the CEO and other C-suite executives;** front-line employees—shop floor, procurement, and core functions like HR and accounting—are equally important
- ☐ **Determine the baseline metrics—key performance indicators (KPIs)—for core business processes**
- ☐ **Inventory and map current systems, workloads, and workflows,** as well as the data the systems process, store, and transmit
- ☐ **Answer questions such as:**
  - Are systems and data siloed or well-integrated?
  - Is data consistent across operations?
  - Are there regulatory/compliance demands for how data is secured or where it is geographically stored?
  - Do mobile employees have the access and data they require?

## SELECTION

- ☐ **Only after companies have performed an internal business assessment** and considered the variables associated with different deployment architectures should they begin to evaluate the specific functions and characteristics of different ERP solutions.

- ☐ **Consider a hybrid solution** that pairs on-premise applications with complementary cloud-based elements
- ☐ **Ensure that the general-purpose functions of an ERP suite are as capable and on point as possible**
- ☐ **Evaluate industry-specific functionality and built-in best practices;** look beyond core ERP functions and processes
- ☐ **Be prepared for a complex change management operation**

## ACTION

- ☐ **Proper phasing of an ERP deployment is critical**
- ☐ **Establish clear priorities and schedules for:**
  - Management reviews and approvals
  - Employee training
  - Data migration
  - ERP module implementation sequences
- ☐ **Modify employee permissions and access rights to specific applications and data**
- ☐ **Monitor, evaluate, and modify**

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