



# 10 Steps to Preparing for Your Next ERP Project

All technology becomes obsolete at some point, and GFOA experience shows that governments undertake a major ERP implementation approximately once every 10 to 15 years. Recent advances in cloud technologies, coupled with the need to adopt more streamlined and modern practices, provide a solid business case for investing in a new system—but these projects are difficult, and the biggest challenge is usually not a technical obstacle to overcome but issues related to organizational change, leadership/governance, training, project management, and planning. Use this checklist as you approach your next ERP project to help ensure you are best prepared for success.

For more information or additional guidance, GFOA's research and consulting center has additional information available at [gfoa.org/rcc](https://gfoa.org/rcc).

## 1

Establish and communicate a vision for the project by setting clear goals.

## 2

Identify leaders at both the organizational level and business process level, and define clear project governance roles for each.

## 3

Create a staffing plan and ensure that resources are not overburdened.

## 4

Build a system inventory for current systems. Make sure to capture all primary systems plus all Excel spreadsheets, manual files, or other tools that you would want to either replace or connect to your new ERP system.

## 5

Review existing business processes for improvement opportunities. Meetings to discuss process change should involve staff from operating departments to consider needs and ideas from different perspectives.

## 6

Issue an RFP and evaluate all vendors based on major risk factors. In today's market, most projects that fail do so because of a bad implementation, not faulty software.

## 7

Develop clear, outcome-focused requirements to set expectations about scope that can be used to hold your vendor accountable.

## 8

Prepare a full project plan that dedicates sufficient time for critical tasks before the system goes live, such as testing and training.

## 9

Insist on a fixed-fee contract based on completion of milestones for all implementation-related professional services.

## 10

Communicate. Communicate. Communicate. Help create a culture that is inclusive, open to discussing new ideas, and welcomes participation from across the organization.