



## **ERP Requirements Prioritization Checklist**

*Use this checklist to align your ERP strategy with your business priorities and secure buy-in from your executive leadership*

Version 1.3

## 1. Strategic Alignment:

- Verify alignment with overall business strategy and objectives
- Confirm that ERP requirements support the organization's long-term goals.
- Prioritize requirements that contribute directly to the organization's competitive advantage.

## 2. Critical Business Processes:

- Identify and prioritize requirements related to critical business processes.
- Evaluate the potential business impact of each requirement.
- Ensure that the ERP system addresses key operational workflows efficiently.

## 3. Stakeholder Input:

- Engage in workshops and interviews with representatives from each department and understand their needs and requirements.
- Gather input from key stakeholders across departments.
- Consider feedback from end-users, managers, and executives.
- Assign weight to requirements based on stakeholder input and significance.

## 4. Regulatory Compliance:

- Identify requirements necessary for compliance with industry regulations.
- Prioritize features that streamline reporting and auditing processes.
- Ensure the ERP system can support reporting and adherence to legal standards.

## 5. Data Security and Privacy:

- Prioritize requirements related to data security and privacy.
- Confirm that the ERP system meets industry standards for protecting sensitive information.
- Assess the ERP system's ability to manage user access and permissions effectively.

## 6. Scalability and Flexibility:

- Assess scalability requirements for future business growth.
- Ensure the ERP system is flexible enough to adapt to changing business needs.
- Evaluate the system's capacity to handle increased data volumes.

## 7. Integration with Existing Systems:

- Identify integration requirements with existing software and systems.
- Evaluate the compatibility of the ERP system with current IT infrastructure.
- Prioritize seamless data exchange between the ERP system and other applications.

## 8. User Experience:

- Prioritize features that enhance user experience and usability.
- Consider the needs and preferences of end-users during requirement prioritization.
- Incorporate feedback from end-users to refine usability requirements.

## 9. Training and Change Management:

- Identify requirements for comprehensive training materials and resources.
- Prioritize features that facilitate a smooth transition for end-users.
- Develop change management strategies based on identified requirements.

## 10. Cost-Benefit Analysis:

- Assign a cost and benefit value to each requirement.
- Conduct a thorough analysis of the expected return on investment (ROI).
- Prioritize requirements that offer the most significant business benefits relative to implementation costs.

## 11. Customization and Adaptability:

- Identify requirements that need customization.
- Assess the ease of configuration for specific customization needs.

## 12. Reporting and Analytics:

- Identify requirements for robust reporting and analytics capabilities.
- Prioritize features that support data-driven decision-making.
- Assess the flexibility of the ERP system in generating custom reports.

## 13. Support and Maintenance:

- Consider requirements related to ongoing support and maintenance.
- Ensure the ERP vendor provides reliable support and upgrade options.

## 14. Timeline and Implementation Phases:

- Develop a phased implementation plan with defined timelines.
- Prioritize requirements based on their alignment with specific implementation phases.
- Consider dependencies and sequence requirements accordingly.

## 15. Risk Mitigation:

- Identify potential risks associated with each requirement.
- Prioritize requirements that contribute to risk mitigation and project success.
- Develop risk mitigation strategies for high-impact requirements.

## 16. Feedback and Iteration:

- Plan for continuous feedback loops during and after implementation.
- Prioritize requirements that allow for iterative improvements based on user feedback.
- Schedule regular review sessions for ongoing refinement of requirements.

## 17. Vendor Evaluation:

- Consider the reputation and track record of ERP vendors.
- Conduct detailed needs assessment and discovery calls with vendor to understand if their strengths and experience matches your business needs and requirements.
- Consider customer reviews and testimonials in the evaluation process.
- Ask questions about their personalized approach and support response times for issue resolution.

## 18. Mobile Accessibility:

- Identify the need for mobile accessibility based on user requirements.
- Prioritize requirements for mobile functionality based on organizational needs.
- Ensure that mobile functionality aligns with organizational mobility goals.

## 19. Usability Testing:

- Plan for usability testing of key requirements.
- Prioritize features that can be validated through user testing.
- Incorporate insights from usability testing into the refinement of requirements.

By systematically evaluating and prioritizing ERP requirements using this checklist, organizations can ensure that their ERP implementation addresses critical needs and aligns with the strategic direction of the business.