



Checklist for Preparing Your Manufacturing Business for ERP Success

☐ Define Your Goals and Pain Points

- ☐ Identify the specific challenges your business faces today (e.g., data duplication, slow reporting).
- ☐ Set measurable goals for what success looks like after ERP implementation.
- ☐ Keep these goals documented and visible for your project team.

☐ Map Your Core Workflows

- ☐ Document how orders, purchasing, and production flow through your business.
- ☐ Note every handoff between departments and identify manual steps or delays.
- ☐ Highlight where real-time visibility would make the biggest impact.

☐ Clean and Standardize Your Data

- ☐ Eliminate duplicate part numbers, vendors, and customer records.
- ☐ Standardize naming conventions and remove inactive SKUs.
- ☐ Assign one owner for each data category to maintain consistency.

☐ Evaluate System Connectivity

- ☐ List all systems currently used (accounting, inventory, CRM, EDI, shipping).
- ☐ Mark which ones exchange data automatically and which rely on manual entry.
- ☐ Identify integration opportunities for faster data flow.

☐ **Involve Your Team Early**

- ☐ Engage key employees from every department before implementation.
- ☐ Collect input on pain points and wish-list improvements.
- ☐ Ensure everyone understands how ERP will support their daily work.

☐ **Prioritize — Don't Overload**

- ☐ Focus first on the processes that will drive the biggest efficiency gains.
- ☐ Plan a phased rollout instead of doing everything at once.
- ☐ Add additional modules only after core functions are stable.

☐ **Set Realistic Timelines and Resources**

- ☐ Allocate time for data cleanup, training, and testing before go-live.
- ☐ Assign a dedicated internal project lead for accountability.
- ☐ Set milestones that your team can achieve without burning out.

☐ **Train, Test, and Reinforce**

- ☐ Begin training early and repeat sessions post-launch.
- ☐ Use real data scenarios during testing, not just samples.
- ☐ Create simple documentation for ongoing reference.

☐ **Plan for Post-Go-Live Improvement**

- ☐ Review progress 30, 60, and 90 days after go-live.
- ☐ Collect feedback from users and refine workflows.
- ☐ Continuously identify new automation opportunities.

At Pabian Partners, we help manufacturers prepare for ERP success the right way — by focusing on process first, software second. Setup a free consultation by clicking on the link below to discuss your unique scenario.

[Schedule a Free Consultation](#)