Comprehensive ERP Selection Checklist

Business Needs & Requirements	☐ Clearly define business goals and pain points ☐ Identify key processes that need automation and improvement ☐ Map current workflows and identify inefficiencies ☐ Prioritize requirements as "must have" vs. "nice to have" ☐ Involve end users in requirements gathering ☐ Document regulatory compliance requirements
User Experience & Support	☐ Is the system user friendly and easy to navigate? ☐ Does the vendor offer training and onboarding support? ☐ Is there a responsive customer support team? ☐ Evaluate learning curve for different user types ☐ Test accessibility features for diverse users ☐ Review knowledge base, documentation, and self help resources ☐ Verify support availability hours and response times
Functional Capabilities	☐ Covers core business functions (finance, HR, inventory, supply chain, etc.) ☐ Industry specific modules are available (if needed) ☐ Scalable to accommodate future growth ☐ Workflow automation capabilities ☐ Document management features ☐ Project management functionality ☐ Contract lifecycle management

Integration & Compatibility	☐ Integrates seamlessly with existing software (CRM, payroll, ecommerce, etc.) ☐ Supports API connections and third party plugins ☐ Allows for easy data migration from old/existing ERP ☐ EDI (Electronic Data Interchange) capabilities ☐ Integration with IoT devices and systems ☐ Compatibility with common data formats ☐ Batch processing and automation capabilities
Mobile & Cloud Capabilities	☐ Accessible from mobile devices for remote work ☐ Cloud, on premise, or hybrid deployment options available ☐ Secure remote access with proper authentication ☐ Offline functionality when internet connection is unavailable ☐ Native mobile apps vs. responsive web design ☐ Cross Platform compatibility (iOS, Android, Windows) ☐ Data synchronization between devices
Total Cost & ROI	☐ Upfront costs match budget ☐ Assess ongoing costs (maintenance, updates, support, training) ☐ Assess potential return on investment (ROI) ☐ Identify hidden costs (implementation, customization, data migration) ☐ Evaluate pricing models (subscription vs. perpetual licensing) ☐ Calculate potential productivity gains and cost savings ☐ Consider opportunity costs of delayed implementation

Vendor Reputation & Product Viability	☐ Established vendor with a good track record ☐ Regular updates and support offered ☐ Strong customer reviews and case studies available ☐ Length of time in business and product maturity
Scalability & Customization	☐ Can the system grow with your business? ☐ Allows for custom workflows and reports ☐ Supports easy upgrades without major disruptions ☐ Handles increasing transaction volumes ☐ Supports additional users without performance degradation ☐ Customization tools require minimal coding ☐ Configuration vs. customization balance
Security & Compliance	☐ Rolebased access controls to protect sensitive data ☐ Compliance with industry regulations (*GDPR, HIPAA, etc.*) ☐ Regular security updates and data encryption ☐ Audit trails and activity logging ☐ Two factor authentication support ☐ Data backup and disaster recovery processes ☐ Penetration testing and security certifications
Reporting & Analytics	☐ Customizable dashboards and reports ☐ Real time data insights for decision making ☐ Supports business intelligence and predictive analytics ☐ Export capabilities in multiple formats ☐ Data visualization tools and graphical reports ☐ KPI tracking and performance metrics ☐ Easy reporting capabilities for nontechnical users ☐ Verify Director's report compliance with Section 134 ☐ Check compliance with CSR provisions if applicable

Multi-Country & Multi-Language Support	☐ Supports multiple currencies and tax regulations ☐ Multi Language support for global operations ☐ Adapts to regional compliance requirements ☐ Localization capabilities for date, time, and number formats ☐ Support for international accounting standards ☐ Country Specific reporting requirements
Performance & Speed	☐ Handles high transaction volumes without slowdowns ☐ Fast processing speeds for reporting and data retrieval ☐ Reliable uptime and minimal system downtime ☐ System response time under peak loads ☐ Batch processing efficiency ☐ Performance optimization options ☐ Database indexing and query optimization
Management & Stakeholder Buy-In	☐ Senior management supports the ERP implementation ☐ Clear communication plan for all stakeholders ☐ Change management strategies in place to drive adoption ☐ End user representatives involved in selection process ☐ Department heads committed to implementation success
Vendor Roadmap & Future Upgrades	☐ Vendor has a clear vision for future innovations ☐ AI, automation, and emerging technologies supported ☐ Long Term support and development plans ☐ Upgrade path and version release schedule ☐ Backward compatibility guarantees ☐ Customer influence on product roadmap ☐ Innovation track record and R&D investments

Training & Knowledge Transfer	☐ Comprehensive training program for all user levels
	☐ Documentation tailored to your organization
	☐ Video tutorials and self paced learning options
	☐ Ongoing education for new features and updates
	☐ Skills assessment and certification options

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