



PRACTICAL ERP PLANNING TOOL

ERP Implementation Readiness Checklist

For Indian manufacturing, trading and distribution SMEs evaluating Odoo or another integrated ERP approach.

7	4	1
implementation stages	core workflow areas	named business owner required

USE THIS BEFORE REQUESTING A QUOTE

Complete the checklist with your process owners. The goal is not to select software quickly. The goal is to expose missing ownership, data, controls and decisions before they become implementation delays.

Prepared by Malleable Software Private Limited

Founder-led Odoo, website, e-commerce and custom-software delivery
Gadhinglaj, Maharashtra, India

Version 1.0 | Reviewed 2 October 2026 | General planning information - not legal, tax or accounting advice

1

Confirm business readiness

An ERP project needs management decisions and process ownership before it needs software configuration. Mark each statement only when the responsible person agrees.

Leadership and ownership

- ☐ A director or senior manager is the named project sponsor.
- ☐ One person can approve cross-functional process decisions and scope changes.
- ☐ Sales, purchase, inventory and finance each have a named process owner.
- ☐ The team has protected time for discovery, review, testing and training.
- ☐ Management accepts that ERP will expose process and data problems rather than automatically fix them.

Business case

- ☐ We can describe the current problem in operational and financial terms.
- ☐ We know which delays, errors, risks or missed opportunities the project should reduce.
- ☐ We have defined three management questions the new system must answer reliably.
- ☐ We have a realistic implementation and operating budget, not only a software-licence budget.
- ☐ We have agreed what success will look like 30, 60 and 90 days after go-live.

READINESS GATE

If there is no sponsor, no process owner or no measurable business problem, pause software selection. A technical installation will not replace management ownership.

Quick readiness score

Checked statements	Interpretation	Recommended action
8-10	Good starting readiness	Proceed to detailed process and data review.
5-7	Material gaps remain	Assign owners and close gaps before committing to dates.
0-4	High implementation risk	Run a management readiness workshop first.

2

Map four core workflows

Use real transactions, not generic module names. Capture the normal path, approvals, exceptions, documents, data and responsible people.

Workflow	Bring one real example	Questions to resolve
Sales	Enquiry, quotation, order, delivery and invoice	Pricing? Discounts? Credit approval? Partial delivery? Returns? Salesperson ownership?
Purchase	Requirement, supplier quote, purchase order, receipt and bill	Who requests, approves and receives? How are shortages, excess and price changes handled?
Inventory	Receipt, internal movement, issue, delivery, return and adjustment	Products? Units? Locations? Lots/serials? Negative stock? Reorder rules? Valuation responsibility?
Finance	Customer invoice, receipt, vendor bill, payment and month-end review	Taxes? Journals? Payment matching? Opening balances? Access control? Accountant review?

Scope discipline

- ☐ We have separated mandatory first-release needs from later improvements.
- ☐ Every requirement has a business owner and a reason.
- ☐ We will test whether a standard workflow is acceptable before requesting customization.
- ☐ Reports are defined by the decision they support, not by a long unprioritized list.
- ☐ Manufacturing, barcode, quality, advanced accounting, integrations and custom modules are included only when specifically assessed.
- ☐ Out-of-scope requests require written impact, price and timeline approval.

Notes - unresolved workflow decisions

3

Prepare data before migration

Poor master and opening data can reproduce old problems inside a new system. Assign owners, formats, validation rules and cut-off dates.

Data set	Named owner	Cleaned	Validated	Cut-off date
Customers				
Suppliers				
Products/items				
Units and categories				
Price lists				
Taxes and fiscal data				
Warehouses/locations				
Opening stock				
Receivables/payables				
Chart and opening balances				

Data controls

- ☐ A single approved template exists for each migration data set.
- ☐ Duplicates, inactive records and inconsistent units have been reviewed.
- ☐ Required fields and allowed values are documented.
- ☐ Sample imports will be tested before the final migration.
- ☐ Opening quantities and balances will be reconciled to an approved source.
- ☐ The final cut-off and responsibility for late transactions are agreed.
- ☐ Historical data not required for operations has an archive plan instead of being imported automatically.

IMPORTANT

Data cleaning is a business responsibility unless the proposal explicitly prices and assigns it. The person who understands the record must approve it.

4

Control build, testing and change

A working demo is not acceptance. Test realistic scenarios, permissions, exceptions and outputs against written criteria.

Configuration and review

- ☐ The approved scope, assumptions and exclusions are written and signed off.
- ☐ Configuration decisions are recorded with owner and date.
- ☐ Users and roles follow least-privilege access rather than shared administrator accounts.
- ☐ Each demonstration uses recognizable business data and an end-to-end scenario.
- ☐ Custom code and third-party modules have an owner, licence, repository and maintenance plan.
- ☐ A change request states the reason, scope, price, timeline and acceptance impact before work starts.

User acceptance testing

- ☐ Named business users, not only developers, perform acceptance tests.
- ☐ Tests cover normal, exception, return, cancellation and correction scenarios.
- ☐ Permissions are tested for each important role.
- ☐ Documents, taxes, quantities, values and reports are reconciled to expected results.
- ☐ Defects are distinguished from new requests.
- ☐ Critical defects are closed and retested before go-live approval.
- ☐ The sponsor records a written go-live decision and accepts documented residual risks.

Risk signal	Required response
"We will decide the process after installation."	Pause configuration and complete process ownership.
"Import everything exactly as it is."	Profile, clean, sample-test and reconcile data first.
"Make every request part of the original price."	Enforce written scope and change control.
"Users are too busy to test."	Do not approve go-live without business acceptance.

5

Plan go-live and operating ownership

Go-live transfers responsibility into daily operations. Confirm access, training, cutover, support, backups and recovery before the launch date.

Go-live gate

- ☐ Production hosting, domain, SSL, email and administrator access have named owners.
- ☐ The backup schedule, retention, encryption, off-site copy and restoration test are documented.
- ☐ Final master and opening data are approved and reconciled.
- ☐ Users have completed role-based training with written operating instructions.
- ☐ The cutover plan identifies transaction freeze, migration, verification and fallback decisions.
- ☐ Support contacts, hours, response targets, exclusions and escalation are written.
- ☐ The first 30 days include daily or scheduled review of critical transactions and unresolved defects.

Deployment responsibility

Area	Cloud / managed option	Local / customer-hosted option
Availability	Provider obligations must be written.	Customer owns suitable hardware, power, network and access unless contracted otherwise.
Backups	Schedule, retention and restore testing must be defined.	Customer performs and verifies manual backups unless a separate service is purchased.
Security/updates	State provider and customer responsibilities.	Customer needs an accountable technical owner.
Recovery	Recovery objectives and exclusions must be stated.	Missing or unusable backups may make recovery impossible.

LOCAL BACKUP WARNING

If the customer chooses a local deployment and does not purchase a managed backup service, the customer must create, protect and test backups. Recovery cannot be promised when usable backups do not exist.

6

Record the commercial decision

A responsible proposal separates one-time implementation work, recurring services, third-party charges and customer responsibilities.

Cost / responsibility	One-time	Recurring	Owner / supplier	Approved
Discovery and process mapping				
Configuration and implementation				
Data preparation/migration				
Training and documentation				
Software subscription/licence				
Hosting and monitoring				
Backup and recovery service				
Support and maintenance				
Custom modules/integrations				
Third-party services				

Final approval gate

- ☐ The selected edition and deployment are justified by demonstrated requirements.
- ☐ All licence, hosting, third-party and recurring charges are visible.
- ☐ Deliverables, exclusions, customer responsibilities and acceptance criteria are written.
- ☐ Payment milestones and change-control rules are understood.
- ☐ Data ownership, access, confidentiality, intellectual property and termination obligations are contractually addressed.
- ☐ The project fits available staff capacity and does not depend on unlimited unpaid work.

7 Use the first process review well

Bring evidence from the real operation. A focused review should identify fit, risks and the smallest responsible first release - not force an immediate sale.

Bring these items

01	One complete sales-to-delivery transaction
02	One complete purchase-to-receipt transaction
03	Product/item, unit, category and warehouse structure
04	Current stock and valuation responsibility
05	Sample invoice, tax and accounting outputs
06	User list, roles and approval responsibilities
07	Top three control or reporting problems
08	Target date, budget range and decision process

Request an ERP process review

malleablesoft.in/contact/?solution=odoo
sales@malleablesoft.in | +91 90213 13952

Sources and disclosure

Prepared using Malleable Software's implementation-control framework and current public Odoo 19 documentation. Useful references: Odoo 19 administration, India localization and the official edition comparison. Odoo is a trademark of Odoo S.A. Malleable Software Private Limited does not claim an Odoo partnership in this document. Product capabilities, licences and pricing can change; verify current official information before purchase.

Privacy note: Do not send confidential customer, payroll, password, banking or production data for an initial review. Use redacted samples until confidentiality and data-handling arrangements are agreed.