Manufacturing ERP Implementation Checklist

Your Roadmap for a Successful ERP Rollout



PLANNING

IMPLEMENTATION

GO-LIVE

CONTINUOUS IMPROVEMENT

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ERP Implementation Roadmap

Implementing a manufacturing ERP is a significant operational shift that impacts how your organization manages production, inventory, financials, and day-to-day workflows.

This checklist is designed to help manufacturing teams assess readiness, reduce implementation risks, and ensure a smoother transition from planning to post-go-live optimization.

1

PREPARE

Define goals and select the right solution.

2

SELECT

Choose the right ERP and implementation partner.

3

IMPLEMENT

Configure, test, and prepare your team.

4

GO LIVE

Deploy with confidence and support.

5

IMPROVE

Optimize and continually drive value.

IMPLEMENTATION TIP:

A successful ERP Implementation starts with preparation, alignment, and the right partnership.



Pre-Implementation Steps

Goal: Select your ideal solution

STEP 1:

Define Goals & Build the Business Case

- Define the key operational challenges driving the ERP investment
- Document measurable goals (visibility, efficiency, cost control)
- Establish timeline expectations and project milestones
- Align leadership on desired outcomes and priorities
- Identify compliance, reporting, or traceability requirements

TIP:
A strong business case drives alignment and long-term success.

STEP 2:

Confirm ERP Fit for Your Manufacturing Needs

- Identify must-have capabilities for production and operations
- Define requirements for planning (scheduling, MRP, capacity)
- Capture needs for inventory, tracking, and traceability
- Document quality control or regulatory requirements
- Separate must-have needs from future-phase enhancements

TIP:
Focus on what you need now, but plan for future growth.

STEP 3:

Select an Implementation Partner

- Evaluate partners with experience in your type of manufacturing
- Review customer references, case studies, or success stories
- Confirm they support required integrations and customizations
- Explore training offerings (end-user and ongoing education)
- Discuss post-go-live support and long-term partnership model

TIP:
The right partner reduces risk and accelerates results.

Implementation Steps (PART 1)

Goal: Successfully deploy new software



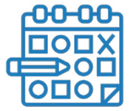
STEP 1:

Assemble Your Implementation Team

- Assign an executive sponsor
- Appoint a project manager with decision authority
- Include representatives from finance, operations, production, and IT
- Identify additional stakeholders (sales, service, etc.) as needed
- Define internal vs. partner responsibilities



TIP:
A dedicated project team keeps implementation moving forward.



STEP 2:

Establish Goals with Dates

- Establish realistic project timelines and key milestones
- Identify dependencies (integrations, data readiness, training needs)
- Align internal team and implementation partner on expectations
- Document success criteria for go-live and beyond
- Confirm resource availability (time, budget, internal support)



TIP:
Clear milestones help keep the project on schedule.



STEP 3:

Define Scope, Processes, & Integrations

- Document current processes and inefficiencies
- Identify all required integrations
- Determine user roles and access needs
- Evaluate customization vs. standard configuration
- Consider operational risks (shop floor, warehouse, etc.)



TIP:
Document processes before configuring your ERP.



STEP 4:

Prepare Data for Migration

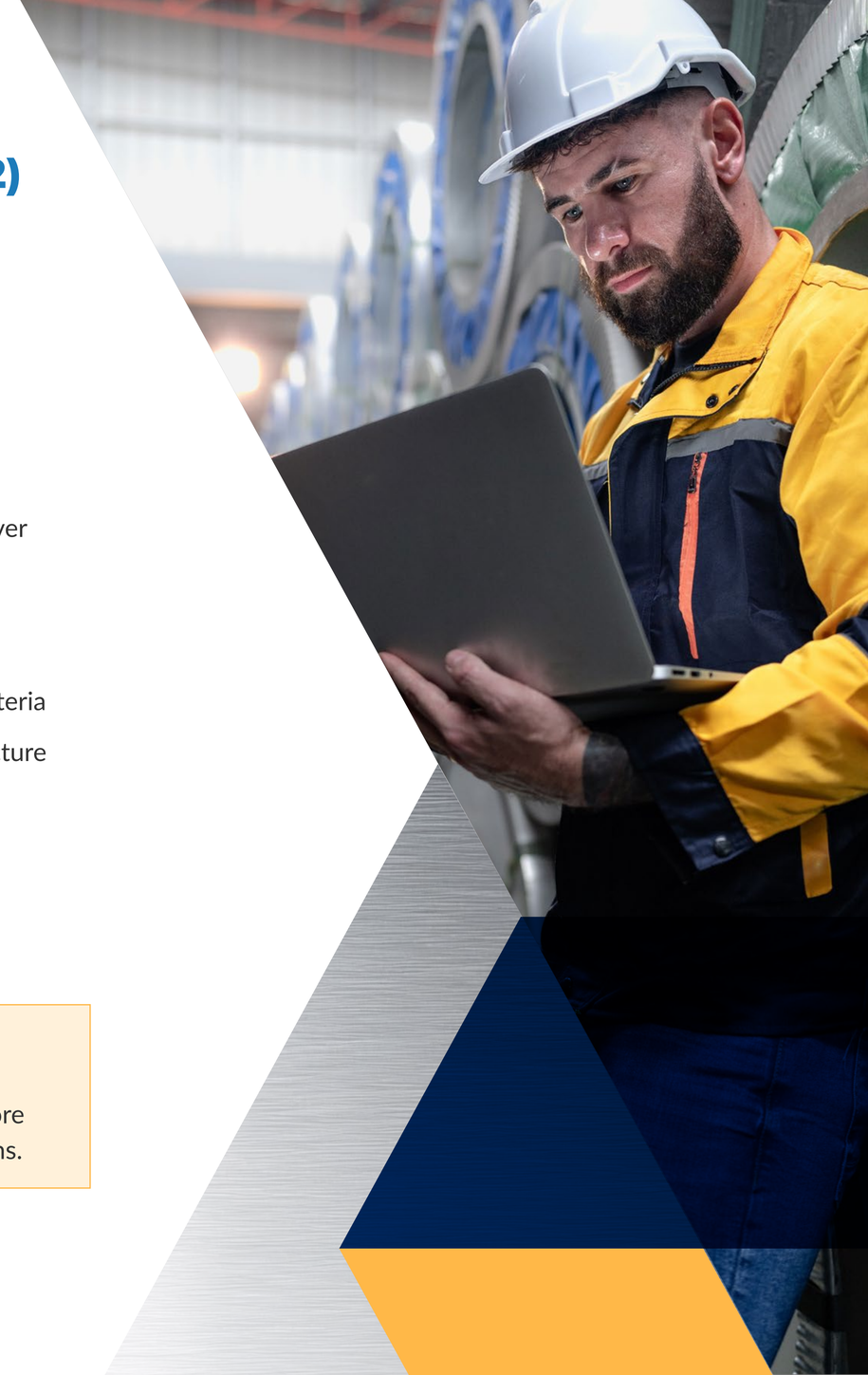
- Identify all data sources for migration
- Remove duplicate or outdated records
- Standardize data structures and formats
- Validate migration approach through testing
- Confirm data accuracy with stakeholders



TIP:
Clean data before migration to improve reporting.

Implementation Steps (PART 2)

Goal: Successfully deploy new software



STEP 5:

Build & Configure

- Configure financials, reporting, core workflows
- Configure manufacturing processes (BOMs, routing, inventory tracking)
- Set up user roles and permissions
- Set up integrations with required systems
- Establish reporting structures and dashboards

TIP:
Configure standard processes first before customization.

STEP 6:

Model

- Test end-to-end workflows using realistic scenarios
- Validate data accuracy within the system
- Confirm integrations are functioning properly
- Train users on the new system
- Obtain user feedback and sign-off

TIP:
Test with real-world scenarios to uncover issues early.

STEP 7:

Go Live

- Finalize deployment and cutover plan
- Complete data migration and validation
- Define go/no-go readiness criteria
- Establish go-live support structure
- Define issue tracking and resolution processes

TIP:
Prepare a go-live support plan before deployment begins.

Post-Implementation Steps

Goal: Reap the long-term benefits of a software switch

STEP 1:

Plan for Continuous Improvement

- Follow up on post-go-live support plan
- Define process for enhancements and updates
- Plan ongoing user training
- Schedule regular system reviews
- Identify future phases or expansion opportunities

TIP:

Go-live is just the beginning. Review processes regularly to maximize your ERP investment.



Your ERP Manufacturing Implementation Timeline

How long does it take to implement a manufacturing ERP? In our experience, manufacturing implementations typically take 12–18 months to complete. Project size, customization needs, and data quality influence this timeframe.

Once you've moved from pre-implementation to the implementation process, a typical timeline starting in January might look something like this:



JAN — APR:

The DEFINE phase

(30% of total project time)

- **Step 1:** Assemble Your Implementation Team
- **Step 2:** Establish Goals with Dates
- **Step 3:** Define Scope, Processes, and Integrations



MAY — JUL:

The BUILD phase

(20% of total project time)

- **Step 4:** Prepare Data for Migration
- **Step 5:** Build & Configure



AUG — NOV:

The MODEL phase

(30% of total project time)

- **Step 6:** Model



DEC — FEB:

The DEPLOY phase

(20% of total project time)

- **Step 7:** Go Live

Longer and more complex implementations typically cost more than ones that are short and simple. For more detailed pricing information, you'll need to speek with an ERP manufacturing implementation specialist.



Tips for Smoother Implementations

According to Gartner research, by 2027, more than 70% of ERP implementations will fail to meet business goals and KPIs. Collaboration and cooperation are more important than ever for companies investing in new ERP solutions, including manufacturers. That's why we've highlighted the most common ERP implementation roadblocks to help you smooth them down into nothing more than speed bumps.

IMPLEMENTATION PITFALLS:

These common missteps can slow down your implementation

- **Fixed Deadlines.** Deadlines are helpful, but if they're too rigid, you may rush to go-live and risk broken integrations, missing data, or other software issues.
- **Passive Meetings.** When implementation team meetings become little more than status report regroups, progress can stall, and team members may not understand their responsibilities.
- **Surprise Project Additions.** As your implementation progresses, you may identify additional customizations you'll want to include in the scope as soon as possible.
- **Responsibility Switching.** Depending on which stage of the implementation you're at, project team members may drop off, assuming their jobs are done.
- **Process Dissonance.** Updating your ERP unlocks new ways of doing business to save time, but team members may find them hard to adopt.

STRATEGIC SOLUTIONS:

Avoid the roadblocks and keep your implementation moving

- **Flexible Deadlines.** Communicate delays with your implementation partner and decide whether to push through, pause, or pivot.
- **Action Items.** Assign stakeholders relevant tasks between meetings to keep the project moving and let meetings mark transitions between implementation stages.
- **Prioritize Basics.** Create a backlog of additional customizations with priority levels so you complete the most crucial tasks first. Remember, there's always time after go-live for adjustments!
- **Team Commitment.** Ensure that stakeholders and project team members are involved at every step of the process, even if they don't have action items.
- **Slow and Steady Training.** Get your end users acquainted with the new software before you make sweeping changes to business processes.

Planning a Manufacturing ERP Implementation?



MEET CARGAS!

Cargas is an employee-owned software company with over 35 years of business solutions experience. We've helped 99% of our customers successfully implement top solutions, including ERP applications from Microsoft and Acumatica. Our customers include discrete and process manufacturers operating in spaces such as metal fabrication and machining, industrial equipment, building products and construction materials, furniture, plastics and textiles, medical, packaging, distribution, and more.

If you're curious about Cargas' strategy for implementing and supporting manufacturing ERP software, reach out today for a no-obligation chat. We'll evaluate your business needs and processes to determine the best path forward. the best path forward.

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