Checklist: Green Lights vs. Red Flags

How to know if your ERP program is set up to succeed — or at risk.

Before you commit millions to ERP implementation, validate your readiness. This quick checklist helps you spot the green lights that signal readiness, and the red flags that call for a pause or reset.

Green Lights

☐ **Caliber & capacity of SMEs**
Named SMEs with bandwidth to help re-engineer (not just lift & shift).

☐ **Future-state processes documented**
Swimlanes mapped across all systems (not siloed O2C/P2P).

☐ **Chart of Accounts redesign planned**
Leverages dimensions; avoids legacy lift & shift.

☐ **Dedicated solution architect**
Required on any 4+ system program.

☐ **Current → pain → future articulated**
Team can describe as-is, pain points, and is open to change.

☐ **Data readiness defined**
Master data model, ownership, transformations, downstream reporting mapped.

☐ **PMO & governance in place**
Steering Committee, RACI, weekly scope control, architect gates.

☐ **Post-go-live plan set**
Budget and roadmap for adoption & continuous improvement.

Red Flags

☐ **"Lowest-bid wins" mindset**
Choosing vendors based only on cost, not capability, often leads to overruns and rework.

☐ **No project plan — or unrealistic one**
A vague timeline or "3 months no matter what" plan signals lack of structure.

☐ **No architect on multi-integration build**
Complex system landscapes without an architect cause hidden gaps and failures.

☐ **Buying software without vetting implementer**
Choosing an SI with no proven industry expertise risks costly misalignment.

☐ **Go-live date set before requirements**
Fixing a deadline without knowing scope or complexity almost guarantees delays.

☐ **Shadow spreadsheets control processes**
Critical operations still run on uncontrolled Excel files outside the ERP design.

☐ **UAT planned < 4–6 weeks**
A short, templated UAT ignores the true volume of test cases and integrations.

☐ **No support budget**
Assuming "we'll figure it out later" leaves you unprepared for post-go-live needs.