

 Priority

ERP upgrade checklist



50 questions every business should answer before upgrading their ERP

A practical, step-by-step guide to help your team reduce risk, avoid surprises, and ensure a smoother transition.



Why ERP upgrades fail

Upgrading your ERP is about more than installing the latest software. It's an opportunity to improve how your business operates, from finance and inventory management to manufacturing, supply chain, customer service, and reporting. A well-planned upgrade can introduce new capabilities, strengthen security, streamline processes, and give your teams the tools they need to work more efficiently.

Yet many ERP upgrades fall short of expectations, not because of the technology itself, but because organizations underestimate the planning involved. Outdated data, undocumented customizations, incompatible integrations, unclear project goals, and insufficient user training can all create unnecessary delays, increase costs, and disrupt day-to-day operations.

The good news is that these challenges are largely preventable. With the right preparation, businesses can reduce risk, minimize downtime, and help users adopt the new system with confidence.

This checklist is designed to guide you through every stage of the upgrade process, from assessing your readiness and preparing your data to testing, training, go-live, and post-launch optimization. Use it to identify potential gaps early, ask the right questions, and build a stronger foundation for a successful ERP upgrade.

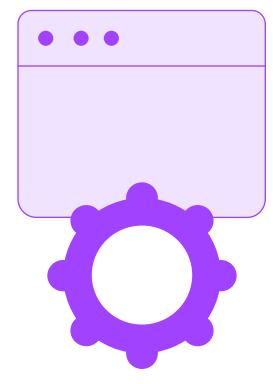
According to [Gartner](#), more than **70%** of recently implemented ERP initiatives will fail to fully meet their original business use case goals.

Did you know?



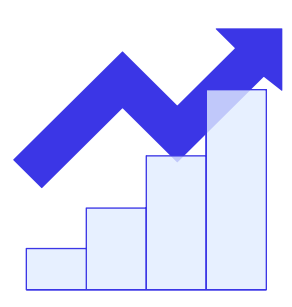
Are you ready for an upgrade?

Before you begin planning your ERP upgrade, take a few minutes to assess where your business stands today. Check **Yes** for each statement that applies to your organization:



System and technology

- ☐ **Is your ERP approaching end-of-support or running on an outdated version?**
Why it matters: Unsupported software can expose your business to security vulnerabilities, compatibility issues, and compliance risks.
- ☐ **Are employees relying on spreadsheets or manual workarounds to complete routine tasks?**
Why it matters: If users regularly work outside of your ERP, it's often a sign that the system no longer supports your business processes effectively.
- ☐ **Does it take longer than it should to generate reports to access business insights?**
Why it matters: Slow or outdated reporting delays decision-making and makes it harder to respond quickly to changing business conditions.
- ☐ **Are employees relying on spreadsheets or manual workarounds to complete routine tasks?**
Why it matters: Aging integrations can create data inconsistencies, increase maintenance costs, and limit your ability to adopt new technologies.



Business growth

- ☐ **Has your business outgrown your current ERP's capabilities?**
Think about whether you've added new products, warehouses, locations, business units, or sales channels that your ERP struggles to support.
Why it matters: As your business evolves, your ERP should scale with it, not force your teams into manual processes.
- ☐ **Are customizations making upgrades difficult or preventing you from adopting new features?**
Why it matters: Over time, excessive customizations can increase technical debt, making every upgrade more complex and costly.
- ☐ **Are users frustrated with the system or avoiding certain processes because they're too complicated?**
Why it matters: Low user adoption often leads to inconsistent data, process bottlenecks, and reduced return on your ERP investment.
- ☐ **Do you lack real-time visibility into key business metrics such as inventory, financial performance production, or customer orders?**
Why it matters: Limited visibility makes it harder to make informed decisions and respond quickly to operational challenges.

Your Results

0–2 Yes answers

Your current ERP may still be meeting your business needs, though it's worth reviewing your long-term technology roadmap.

3–5 Yes answers

Your organization is showing signs that it's time to start planning an ERP upgrade. Addressing these challenges proactively can reduce future costs and business disruption.

6 or more Yes answers

Your ERP is likely limiting business performance. A structured upgrade or a broader ERP modernization initiative could help improve efficiency, support growth, and reduce operational risk.

Build your upgrade strategy before touching a single server

Successful ERP upgrades begin months before implementation

Leadership



Assign an executive sponsor

Someone needs authority to remove roadblocks and make decisions quickly.

Success metrics



Define what success looks like

For example: faster month-end close, better inventory accuracy, less manual work, improved reporting. Use the SMART goal framework (specific, measurable, achievable, relevant, time-bound) to guide you.

Scope



Know exactly what's included and what's not

Don't let "while we're at it" delay your goals. Clearly define the scope in writing to make sure you stay on track.



Clean up before you move

Don't migrate problems into your ERP – make sure you start off with a tabula rasa.

Customers

- ☐ Remove duplicates
- ☐ Archive inactive accounts
- ☐ Remove duplicates

Inventory

- ☐ Remove obsolete SKUs
- ☐ Verify inventory balance
- ☐ Review warehouse locations

Finance

- ☐ Review chart of accounts
- ☐ Validate tax codes
- ☐ Close unnecessary GL accounts

Review your customizations

Ask yourself the following about your customizations to make sure they're still relevant in your new ERP:

- ☐ Would we build this today?
- ☐ Does it still solve a real business problem?
- ☐ How often is it actually used?
- ☐ Can standard ERP functionality replace it?
- ☐ Who owns it?
- ☐ What happens if we remove it?

“The system implementation was very interesting actually because it helped us dive into our company procedures and look into our own company’s processes... obviously we had to do some customizations. They would ask us questions, it wasn’t to challenge us in any way but it was to just get a better understanding of our company, and it actually helped because we suddenly started to look into into our company’s details and wondered why are we doing things a certain way? It helped us get out of the ‘this is how it’s always done’ mentality.”



Enrique Menocal, CFO, Dejavoo

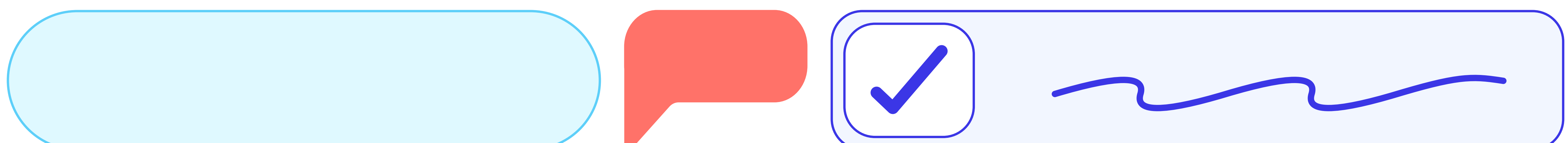


Test like it's go live

The best ERP projects rehearse before opening night. Make sure you test the following:

- ☐ Month-end close
- ☐ Order-to-cash
- ☐ Procure-to-pay
- ☐ Manufacturing processes
- ☐ Warehouse operations
- ☐ Mobile users
- ☐ Integrations
- ☐ Reports
- ☐ Security permissions

Pro tip: Testing isn't about proving everything works, it's about **finding problems** while you still have time to fix them.



Prepare your people

People, not software, determine whether an ERP upgrade succeeds.

Communication

- ☐ Make sure employees know what's changing
- ☐ Make sure users know where to ask questions
- ☐ Identify department champions

Training

- ☐ Provide role-specific training for every department
- ☐ Have users practice real scenarios
- ☐ Make quick reference guides available

Adoption

- ☐ Measure success after go live
- ☐ Plan additional training

Go live with confidence

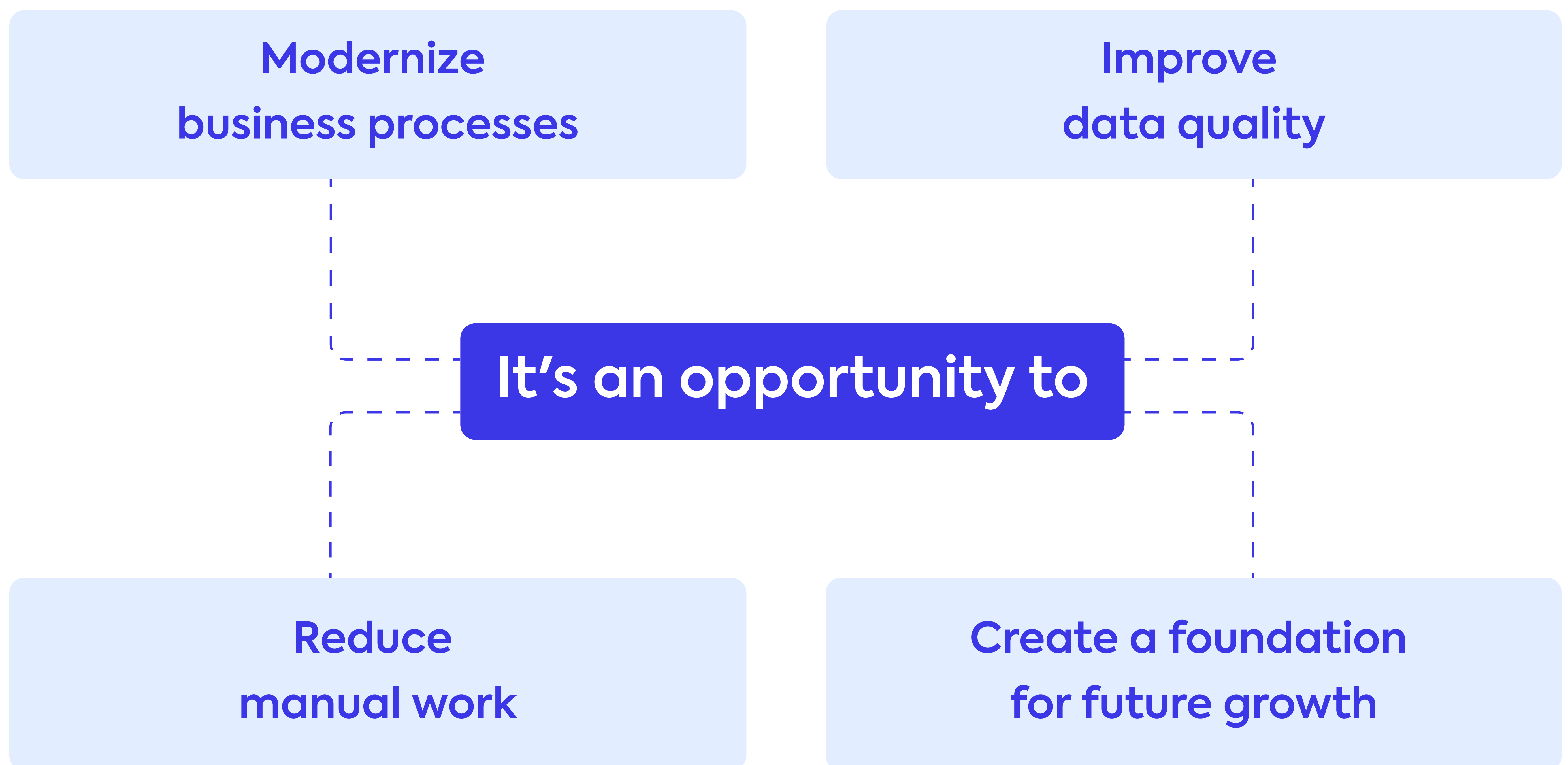
Final readiness checklist to make sure you're set up for success.

- ☐ Backups completed
- ☐ Data validated
- ☐ Security reviewed
- ☐ Integrations tested
- ☐ Rollback plan documented
- ☐ Executive approval received
- ☐ Hypercare team ready



What happens after go live?

Upgrading your ERP isn't simply about moving to a newer version.



The organizations that see the greatest return don't stop at go-live, they continue refining workflows, introducing automation, expanding functionality, and helping users get more value from the system over time.

That's why implementation matters just as much as the software you choose.



You don't know have to navigate your ERP upgrade alone

An ERP upgrade can feel overwhelming. From planning and data migration to testing, training, and go-live, there are countless decisions that can impact the success of your project.

That's where Priority comes in.

Our Professional Services team works alongside you throughout the entire upgrade journey, helping you plan ahead, avoid common pitfalls, and keep your project on track.

Whether you're upgrading an existing Priority ERP environment or moving from another ERP system, you'll have experienced consultants guiding you every step of the way.

We'll help you:

- ✓ Build a realistic implementation plan and timeline
- ✓ Review your data, processes, and customizations
- ✓ Prepare for migration and testing
- ✓ Train your users for a smooth transition
- ✓ Support your team through go-live and beyond

With more than

25 years
of implementation
experience

900+
ERP implementations
completed each year

Priority's in-house implementation team has helped organizations around the world modernize their ERP with confidence. Our goal isn't just to deliver a successful go-live, it's to make sure your teams are set up for long-term success.

Ready to take the next step?

Whether you're still exploring your options or already planning your upgrade, our experts are here to answer your questions and help you build a roadmap that's right for your business.

[Book a consultation here](#)

