

The core principles of ERP implementation.

Before. During. Beyond go-live.

A practical planning guide for business leaders, finance teams, process owners and implementation teams. Use it to make responsibilities clear, prepare the organization and decide when the next stage is ready.

THE JOURNEY	THE QUESTIONS THAT MATTER
Prepare	Why are we changing? Who owns the result? What is in scope?
Deliver	Is the design fit for purpose? Can we trust the data? Are users ready?
Sustain	Can the business operate confidently? How will we improve?

Designed for organizations of different sizes. Scale the governance and documentation to your risk and complexity; keep the ownership and evidence.

Prepared by Tripearltech · September 2026

A planning reference, not a substitute for a project-specific implementation plan. Product capabilities, licensing and local requirements must be validated for your chosen ERP.

02 / Start with business outcomes

ERP is a business change supported by technology. A software installation is not the same as a successful implementation. Establish what will improve and how your team will recognize it.

Describe the problem before selecting the feature

Write down the operational problem, its impact and the people affected. For example: finance spends time reconciling inconsistent order records. The outcome is a more reliable close process; a new dashboard alone may not solve the underlying data issue.

DECISION	WHAT TO RECORD
Business case	Current pain, expected benefit, full cost categories and assumptions. Include internal time, migration, integrations, training and ongoing support.
Success measures	Choose a small set of measures: close duration, inventory accuracy, order lead time or overdue receivables. Define calculation, source, baseline and owner.
Sponsorship	Name an executive sponsor who can resolve cross-team decisions and protect business participation.
Process ownership	Assign accountable owners for finance, purchasing, sales, inventory and other in-scope processes. The partner supports decisions; business owners accept them.

Use a benefit record

Outcome: _____
Current baseline and date: _____
Target and review date: _____
Business owner and data source: _____

DECISION GATE

The sponsor approves the problem statement, measurable outcomes, ownership and funding assumptions. Do not treat unmeasured aspirations as committed benefits.

03 / Set scope and a workable design

A clear boundary protects delivery. Start with the transactions your people must complete, then assess how the ERP supports them from beginning to end.

Map complete business scenarios

Follow an order from quote through delivery, invoice and payment. Follow a purchase through receipt, supplier invoice and settlement. Include returns, corrections, approvals and exceptions, not only the simplest transaction.

DESIGN AREA	AGREE BEFORE BUILDING
Scope boundary	Companies, countries, users, process areas and rollout phases. Record explicit exclusions and the assumptions that may change scope.
Standard first	Assess standard configuration before extensions. For each gap, record the business reason, alternatives, maintenance impact and decision owner.
Controls & access	Define approval levels, segregation of duties, permission roles and evidence requirements with relevant business specialists.
Interfaces	List each connected system, data owner, direction, frequency, volume, authentication method and recovery responsibility.
Change control	Record requests with business value, schedule/cost impact and sponsor approval. Keep an agreed backlog separate from committed scope.

Define acceptance early

For each important scenario, document the expected result and who can accept it. A demo is useful feedback; it does not replace recorded business acceptance with realistic data.

DECISION GATE

Process owners accept the solution blueprint, key gaps and design decisions. Unresolved critical dependencies have named owners and dates.

04 / Make the data trustworthy

Poor master data and unreconciled balances can undermine a technically successful rollout. Treat migration as a business workstream with repeated rehearsals.

STEP	PRACTICAL ACTION
1. Decide what moves	Separate master data, open transactions, opening balances and historical records. Agree how excluded history remains accessible.
2. Assign ownership	Name business owners for customers, vendors, items, accounts and other data sets. Document the source of truth.
3. Cleanse and map	Resolve duplicates, missing fields and obsolete records. Map units, tax settings, dimensions and codes to the new structure.
4. Rehearse	Run trial loads in a controlled environment. Record duration, rejected records, corrections and dependencies.
5. Reconcile	Compare record counts, control totals and sample transactions. Finance validates balances; process owners validate operational meaning.
6. Approve cutover data	Agree extraction timing, transaction freeze, delta handling and final reconciliation. Keep traceable sign-offs.

Use a migration control sheet

Data set: _____ Owner: _____
Source count / target count: _____
Source total / target total: _____
Exceptions and resolution: _____
Accepted by / date: _____

Test the connected journey

A successful import is not enough. Verify how the migrated records behave in posting, fulfilment, reporting and integrations. Confirm recovery for failed or duplicate interface messages.

DECISION GATE

Critical records and balances reconcile within approved tolerances. Unresolved exceptions have an explicit, accepted business treatment.

05 / Prove the process. Prepare the people.

Testing and adoption work together. Users need to complete real tasks, recognize exceptions and know where to get help.

Test in layers

Validate configuration and extensions, then integrated end-to-end scenarios. Include permissions, approvals, error paths, reporting and relevant volume or performance checks. Use a dedicated test environment and protect sensitive data.

UAT EVIDENCE	WHAT GOOD LOOKS LIKE
Scenario and owner	Each business-critical scenario has an owner, inputs, steps and an expected outcome.
Observed result	Capture the result and useful evidence. Failed tests have reproducible details and a linked defect.
Defect decision	Prioritize by business impact. Record who approves any workaround or deferred correction.
Retest and acceptance	Retest corrected issues and affected processes. Process owners approve their scenarios.

Teach by role, not by menu

Train a buyer to handle purchasing, a warehouse user to receive and pick, and a finance user to complete their period-end tasks. Provide short job aids for frequent actions and unusual exceptions. Build time for practice into the plan.

Prepare internal champions

Identify accessible people in each function who can support their colleagues. Make the support route, escalation owner and issue-recording method clear before launch. Track attendance and task readiness, not just the number of training sessions.

DECISION GATE

Critical scenarios are accepted, launch-blocking defects are resolved, and each business function confirms user and support readiness.

06 / Make go-live a business decision

A target date is not a readiness assessment. Use a rehearsed cutover plan and a named decision authority to decide whether the organization can operate safely.

READINESS CHECK	EVIDENCE TO REVIEW
Cutover runbook	Sequenced tasks, owners, start/end windows, dependencies and communication points. Include external providers where relevant.
Final data plan	Approved extract, freeze and load steps; reconciliation owners and timing; handling of late transactions.
Operational readiness	User access, approved roles, devices, integrations, reports, training and support contacts validated.
Contingency	Define conditions for pausing, recovery responsibilities and business continuity actions. Do not assume rollback remains simple after live transactions.
Business acceptance	Process owners accept readiness and residual risks. Sponsor records go/no-go decision.
Launch communication	Tell users what changes, when to stop using old processes, how to report issues and where to find guidance.

Rehearse the pressure points

Time the migration and critical validation steps. Rehearse the actions that rely on several teams. If the plan exceeds the available window, change the plan before the final weekend.

Record the decision

Go / no-go: _____

Accepted residual risks and owners: _____

Decision authority and timestamp: _____

DECISION GATE

Proceed only when the named business authority accepts the readiness evidence and contingency arrangements. Document the decision and communicate it.

07 / Stabilize the first 90 days

Go-live begins a new operating phase. Keep implementation expertise available while business owners establish reliable routines and support takes ownership.

PERIOD	FOCUS AND EVIDENCE
Days 1–30: stabilize	Triage issues by business impact, reconcile critical transactions and support the first operational cycles. Review recurring user difficulties daily at first, then adjust the cadence.
Days 31–60: transfer	Complete the support handover, close priority defects and improve job aids. Confirm owners can run regular tasks, monitor integrations and manage access.
Days 61–90: improve	Compare initial performance with the baseline, separate process issues from system issues and agree a prioritized improvement backlog. Confirm the ongoing governance cadence.

Define hypercare exit criteria

Do not end enhanced support by date alone. Agree thresholds for critical defects, stable interfaces, reconciliations, support capability and completion of key business cycles. Some organizations will need a longer stabilization period.

Keep one issue record

Capture the affected process, impact, evidence, owner, next action and resolution. Distinguish defects, user questions, data corrections and enhancement requests so each receives the right treatment.

Protect financial confidence

Plan support around first invoicing, payments, inventory valuation and period close. Finance and operations should jointly review exceptions rather than assuming a posted transaction is necessarily correct.

DECISION GATE

Business owners and support accept the handover with documented open items, escalation routes and responsibilities. Review benefits using evidence, not launch-day enthusiasm.

08 / Keep the system fit for business

A dependable ERP needs ongoing ownership. Establish a manageable rhythm for access, releases, support and improvement.

OPERATING PRACTICE	OWNER / REVIEW PROMPT
Application ownership	Who prioritizes changes and resolves conflicting departmental needs? Maintain a clear business owner and technical owner.
Access reviews	Who approves new access and removes it when roles change? Review sensitive permissions on an agreed cadence.
Updates and regression	Who tracks vendor updates, assesses extension compatibility and tests critical scenarios before release?
Integration health	Who monitors failures, retries and data quality? Define alerting, response ownership and recovery procedures.
Knowledge and support	Where are configuration decisions, runbooks and job aids maintained? Keep escalation routes and supplier responsibilities current.
Benefits review	Are the agreed measures improving? Investigate adoption, process design and data quality before commissioning more customization.

Create a sustainable improvement backlog

Describe each improvement in business terms. Record the expected benefit, affected users, dependencies, effort and risk. Reuse the original acceptance discipline for changes after go-live.

Understand service responsibilities

Cloud hosting does not remove every customer responsibility. Clarify data retention, recovery expectations, security configuration, extensions and support obligations for the selected platform and agreement.

DECISION GATE

Business and technology owners agree an operating model, review cadence and funded improvement priorities. The ERP remains a managed business capability.

09 / Your readiness conversation

Use this page in a planning workshop. Mark each area as Ready, In progress or Not started. Record evidence and one next action; do not turn a checklist score into automatic approval.

AREA	STATUS / OWNER / NEXT ACTION
Outcomes and baseline	
Sponsor and process owners	
Scope and solution fit	
Data ownership and migration	
Integration and security design	
Testing and acceptance	
Training and change readiness	
Cutover and contingency	
Support and improvement	

Bring the right questions to your implementation partner

- Which requirements fit the standard application? Which need extensions?
- What does your estimate assume about our people, systems and data?
- What evidence will we review before accepting each stage?
- Who owns unresolved issues after go-live, and what support is included?

Let’s plan the next step.

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