
CHECKLIST

Business software implementation checklist

Before, during and after: data, migration, training and go-live KPIs



CHECKLIST

Contents

01	How to use this checklist	3
	The four project phases and how to split up the tasks.	
02	Before you start	4
	Goal, scope, team, processes and schedule: the decisions to make first.	
03	Data to prepare	5
	Which data to bring, where it comes from, who cleans it and what not to migrate.	
04	Migration	6
	The steps to import without duplicates, and a field mapping template.	
05	Configuration and testing	7
	What to configure and how to test it with real cases before go-live.	
06	Training	8
	A plan by role and what each person should be able to do before go-live.	
07	Go-live	9
	Cutover day and the first week.	
08	Go-live KPIs	10
	What to measure in weeks 1, 4, 8 and 12 to know whether the implementation works.	
09	After: the first 90 days	11
	The 30, 60 and 90-day reviews, and what usually goes wrong.	

Who it is for

- Companies switching software or merging several tools into one.
- Project leads who have to coordinate operations, office staff and IT.
- Teams moving from paper or spreadsheets to business software.

01

How to use this checklist

Changing the software your company runs on is scary, and for good reason. It can be done without stopping operations if you do it in phases and make each decision on time.

■ The four phases

Phase	What is decided or done	It ends when...
Before	Goal, scope, team, data and schedule.	There is an approved plan and the data is ready.
During	Configuration, migration, testing and training.	Real cases work with the migrated data.
Go-live	The cutover: from now on, work happens only in the new system.	The old system is read-only.
After	Follow-up in the first weeks, and adjustments.	At 90 days, nobody opens the old system.

How to use the lists

- Give each task an owner and a date before you start.
- Cross out what does not apply instead of deleting it: that way it is clear it was decided.
- Go through the list at the weekly project meeting.

One rule for the whole transition: each piece of data has one system of record. If customers are created in the new system, they are created only there. The day someone creates the same customer in both, a gap opens that does not close by itself.

NOTES

02

Before you start

Almost everything that goes wrong in an implementation was decided, or left undecided, before it started.

	Task	Owner	Date
GOAL AND SCOPE			
☐	The project goal, written in one sentence, with three KPIs to tell whether it was met.		
☐	The scope of the first phase: one well-defined area with few dependencies.		
☐	What is left out of the first phase, in writing.		
☐	The order of the next phases. The ERP connection is never the first.		
TEAM			
☐	A sponsor with authority to decide on processes and data.		
☐	A project lead with time blocked in their calendar.		
☐	A pilot team of four to six people, including a skeptic.		
☐	A go-to person in each area for day-to-day questions.		
PROCESSES			
☐	Today's processes, mapped out: how a request comes in, how it is scheduled and how it is closed.		
☐	What changes in the process and what stays the same.		
☐	The documents to redo: work orders, quotes, reports.		
☐	The source-of-truth inventory: which data lives in which system and which system owns it.		
SCHEDULE AND COMMUNICATION			
☐	Dates that do not clash with peak workload or vacations.		
☐	The message to the team: what changes, when and why.		
☐	Who needs to know outside the company: customers, suppliers, accountants.		

NOTES

03

Data to prepare

A migration succeeds or fails before it starts, when the data is prepared. It is the most boring part of the project and the one that decides it most.

	Data	Source	Owner	Cleanup needed
☐	Customers, with a unique key (tax ID or another identifier)			
☐	Each customer's contacts			
☐	Addresses and locations			
☐	Assets or units: code, family, location and customer			
☐	Contracts: scope, term, service levels and prepaid hour blocks			
☐	Items and spare parts: part number, description and stock			
☐	Users, profiles and permissions			
☐	Your customers' rates and terms			
☐	Document templates: work orders, quotes, reports			
☐	Maintenance checklists and task lists			
☐	Recent job history			
☐	Attachments: manuals, certificates, photos			

Cleanup rules

- **One key per customer** that never changes. Without a key, duplicates come back with every import.
- **Decide which record wins** when the same customer shows up under three names. Someone with authority has to decide.
- **Standardize before migrating:** capitalization, addresses, phone numbers and family names.
- **Leave out** inactive and test records.

What not to migrate

- **Old history nobody looks at.** Set a cutoff, for example the last two years, and keep the rest in an export.
- **Fields almost nobody fills in** in the old system.
- **Settings for processes that no longer exist.** If nobody knows why it is there, do not migrate it.

04

Migration

Migrate in parts and check each one. Importing a whole file blindly is the fastest way to fill the new system with errors.

	Step	Owner	Date
☐	Export a full copy of each source system before touching anything.		
☐	Fill in the field mapping (table below) for each type of data.		
☐	Import ten test rows and check them by hand, field by field.		
☐	Fix the mapping and repeat the test until it comes out clean.		
☐	Import the rest and fix only the rows that fail, not the whole file.		
☐	Compare counts: customers, assets and contracts in the source match the destination.		
☐	Check a sample of complete records by hand.		
☐	Schedule the last import of changes right before go-live.		
☐	Set the old system to read-only on go-live day.		

Field mapping

Source field	Destination field	Transformation	Required	Checked
CUSTOMERS.TAX_ID	Customer · Tax ID	No spaces or dashes	Yes	☐

05

Configuration and testing

Configure for the processes you decided on, not the old ones. And test with cases from your own operation, not the ones from the demo.

	Configuration	Owner	Date
☐	Document types, statuses and who can change each status.		
☐	Document numbering.		
☐	Profiles and permissions: each person sees and does only their own work.		
☐	Two-factor authentication for the profiles that need it.		
☐	Document templates with your branding.		
☐	Alerts and notifications: who gets what, and through which channel.		
☐	ERP integration: which data flows, in which direction and how often.		
☐	Email and calendar integration.		
☐	Mobile app access for each technician.		

■ Tests with real cases

Case	Expected result	OK
A request comes in by email.	It is logged with its customer and unit, without retyping the customer's data.	☐
A technician closes a work order on the phone with no signal.	The work order arrives complete when the connection comes back.	☐
The customer signs the work order on the phone.	The work order is locked and the customer gets a copy.	☐
An inspection finds an issue.	A corrective work order is created with a date.	☐
A finished work order has hours and materials.	Billable items reach the ERP without being retyped.	☐
A manager reviews the month.	The report opens without being built by hand.	☐
		☐
		☐
		☐

If a case fails, fix it before go-live, not after. Going live with a broken case that “will get fixed” is the fastest way to send the team back to the old system.

■ Training plan

	Task	Owner	Date
☐	A one-page guide per role with its five most common tasks.		
☐	A power user on each team who answers day-to-day questions.		
☐	Sessions with the real, already migrated data, not sample data.		
☐	A refresher session in the first week after go-live.		
☐	Training planned for people who join later.		

07

Go-live

Go-live is a cutover, not a soft transition: from that day, work happens only in the new system. What helps is having everything ready for the first week's questions.

	Task	Owner	Date
☐	Go-live date announced to the team, affected customers and the suppliers involved.		
☐	Last import of changes done and checked.		
☐	Old system read-only: it can be looked up, but nothing new is logged.		
☐	A go-to person available in each area during the first week.		
☐	A single channel for project questions and issues.		
☐	An issue list with priority and owner.		
☐	A short meeting every day of the first week: what is failing and what is decided.		
☐	At the end of day one, check that the day's requests, work orders and reports are in the new system.		

NOTES

08

Go-live KPIs

In the first weeks you do not measure whether the company is doing better: you measure whether the system is being used. Set the target for each KPI before go-live.

KPI	How it is measured	Target	Wk 1	Wk 4	Wk 8	Wk 12
Work logged in the new system	Requests and work orders logged in it ÷ total requests and work orders					
Active users	Users who logged in during the week ÷ expected users					
Work orders closed on the phone	Work orders closed in the app ÷ total work orders					
Logging delay	Time from finishing a job to it being logged					
Data typed twice	Data that is also logged in another system or spreadsheet					
Old system access	Lookups or entries in the old system					
Open project issues	Count at the end of the week					
Reports that open by themselves	Reports that used to be built by hand and now come out of the system					

How to read them. If logged work does not go up week after week, there is something the team cannot or will not do in the new system. Ask before you push.

NOTES

09

After: the first 90 days

Implementation does not end on go-live day. It ends when nobody opens the old system and the team no longer remembers how things used to be.

■ Reviews

Review	What to check	Done
30 days	Which fields nobody fills in, which steps are unnecessary and which questions keep coming up.	☐
60 days	Whether the go-live KPIs have reached their targets and which configuration changes are still missing.	☐
90 days	Whether the old system can be switched off, and when the next phase starts.	☐

What usually goes wrong

- 1. Nobody decides on duplicates.** Three customer lists with different names for the same company, and nobody with authority to choose.
- 2. Someone keeps using the old system.** If it is not truly cut off, it pollutes the data for months.
- 3. The old system is copied as is,** with its flaws and its fields nobody fills in. Migration is the chance to clean up.
- 4. Only the pilot team gets trained.** Everyone else finds out on the Monday it starts.
- 5. Everyone goes live on the same day,** without a pilot that found the problems first.

A sign it worked: three months after the last cutover, nobody opens the old system, no data is typed twice and the reports that used to be built by hand simply open.

NOTES

About ttendo

ttendo is turned on module by module, imports customers, contracts and inventory from Excel with visual mapping, and connects with your ERP both ways. The invoice is still issued by your connected ERP: ttendo is not an ERP or accounting software.

attendo.me/en/integrations