

IMPLEMENTING A NEW FINANCE SYSTEM

A BASIC CHECKLIST TO IMPLEMENT WELL

Project management

- Have you developed a clear project plan and sign-off points?
- Have you identified key staff and owners for each element?
- Have you defined, agreed, and documented deliverables?
- Have you committed enough time and resource to this process?
- Do you have early access to a sandbox environment at the start of implementation?
- Have you planned for a post-implementation review?

Data cleaning

- Have you cleaned the data effectively?
- Has the data been migrated effectively?
- Have you decided what to do with the old data?
 - Import old data into the new system*
 - Leave old data in the old system (with the costs this brings)*
- Have you developed a good chart of accounts?

User acceptance testing and training

- Have you done sufficient user acceptance testing?
- Have you trained staff effectively?
- Do you know what to do when things go wrong?

The list above is a basic checklist to implement well.