

Is Your ERP Implementation Already Off Track?

A short diagnostic for CFOs, COOs, and project sponsors leading finance systems transformation

We've seen it happen too often: a confident kickoff, a clear project plan, strong executive backing—and yet, six months in, things begin to fray. Missed deadlines, strained resources, frustrated users. Not because the team isn't capable—but because early assumptions went unchallenged.

If you're gearing up for an ERP or accounting system implementation—or are already underway—it's worth pausing for a quick gut check.

Here are six questions we've learned to ask early. They often distinguish projects that deliver... from those that detour.

1. Are you designing the future... or just digitizing the past?

Too many teams assume the new system will “fix” broken processes without rethinking them. If you're mapping legacy workflows 1:1 into the ERP, you're likely hardcoding inefficiencies into your future operations.

Best-in-class projects carve out time to reimagine processes before configuration begins.

2. Has real data reconciliation been tested—or just talked about?

Mock migrations and reconciliations aren't optional—they're critical. If your team hasn't run a full reconciliation with real data (and compared it back to the ledger), your go-live carries risk.

We recommend at least two dry-runs before UAT, not just to test migration tools but to confirm audit trail and balance sheet integrity.



3. Are your Subject Matter Resources (SMRs) really available—or just named on a slide?

You may have the right names in the org chart, but if they're double-booked or covering day jobs, you'll experience delays and rework.

Projects succeed when key internal SMRs are seconded—even partially—and backed by leadership to prioritize the project.

4. Who's owning UAT—your users or your consultants?

If user acceptance testing becomes a box-checking exercise, critical edge cases are missed. Worse, business users may reject the system post-go-live.

Effective UAT is performed by the actual users, not delegated. And it's treated as a genuine acceptance phase—not a late-stage QA check.

5. Is your timeline based on actual resource availability—or wishful thinking?

It's tempting to accept top-down deadlines, but arbitrary dates almost always lead to shortcuts in testing, training, or controls.

Realistic timelines are built from the bottom up, based on task scoping, resource calendars, and implementation complexity.



6. Do users know what's changing—and why?

If change management is reduced to a few training sessions, resistance will surface fast. ERP touches roles, responsibilities, and even identity.

We've seen adoption soar when project teams communicate not just how, but why—linking system goals to user goals early and often.

Where to from here?

If even a few of these questions hit close to home, it may be worth a closer look. We often help teams pressure-test assumptions, refine timelines, and avoid common missteps—before they become costly.

No pitch—just perspective, if it's helpful.

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