

ERP Selection Checklist for Retail

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How to use this checklist

ERP selection is not primarily a technology decision — it's a governance and prioritization decision that happens to involve technology. Most retail ERP selections fail not because the wrong platform was chosen, but because the evaluation process was incomplete, the integration surface area was underestimated, or the organization was not ready to execute what it selected.

Use this checklist before, during, and after your evaluation to ensure you are asking the right questions — not just the ones vendors want you to ask.

Part 1 — Business readiness before you select anything

These questions must be answered before issuing an RFP. If you cannot answer them, your evaluation will produce a vendor selection, not a business decision.

Strategic clarity

- Can you articulate the 3–5 specific business outcomes this ERP must enable? (Not "better data" — specific outcomes.)
- Is there executive alignment on what the ERP will and will not do in the first two years?
- Have you defined what "success" looks like at 6 months, 12 months, and 24 months post go-live?
- Is the decision to replace driven by a clear business problem, or by platform age / vendor pressure?

Process ownership

- Do you have documented current-state business processes, or will you be discovering them during implementation?
- Have process owners been identified for finance, inventory, purchasing, and store operations?
- Is there agreement on which processes will be standardized vs. which will retain customization?
- Who has final say on process decisions when business units disagree?

Data readiness

- Has a data audit been completed to understand the quality and completeness of master data (item, vendor, customer, location)?
 - Do you have a data migration strategy, or are you assuming the implementation partner will handle it?
 - Are there known data quality issues (duplicate vendors, inconsistent item records) that need to be resolved pre-migration?
 - Who owns data quality remediation — IT or the business?
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Part 2 — Integration surface area assessment

Integration is almost always the most underestimated component of retail ERP implementations. Budget 40–60% more time and cost than your initial integration estimate.

Systems inventory

- Have you documented every system that currently integrates with your ERP (or will need to)?
- Do you have a map of data flows — what moves between systems, in what direction, at what frequency?
- Have you identified systems where no integration documentation exists (undocumented point-to-point)?
- Are there legacy systems that will run in parallel with the new ERP during transition?

Critical integrations to evaluate

- POS / store systems (real-time inventory, tender, loyalty)
- E-commerce / OMS (order routing, inventory availability, fulfillment)
- WMS / 3PL (inbound receipts, outbound shipments, inventory reconciliation)
- Vendor EDI (purchase orders, ASNs, invoices)
- Finance / AP (invoice matching, payment processing, GL integration)
- Payroll and HR systems
- Reporting and BI tools
- Loyalty and CRM platforms

Integration architecture questions

- Will the new ERP serve as the system of record for inventory, or will another system?
- What is the integration pattern — event-driven, batch, API-first?
- Does the selected ERP have pre-built connectors for your critical systems, or will all integration be custom?
- Who is responsible for integration development — the ERP vendor, an SI, or your team?

Part 3 — Vendor evaluation criteria

Functional fit

- Does the platform have native retail functionality (multi-location inventory, store operations, buying/allocation)?
- Have you conducted a structured fit/gap analysis against your documented requirements?
- Are there known gaps that require customization — and have you received fixed-scope estimates for each?
- Does the vendor have retail reference customers in your segment (specialty, grocery, multi-format) with comparable revenue?

Implementation risk

- What is the vendor's documented go-live success rate for retail implementations in your size range?
- Have you spoken directly with 3+ reference customers — not ones the vendor selected for you?
- What is the average implementation timeline for comparable customers? How does that compare to the vendor's proposal?
- What percentage of implementations in your tier exceed original budget by more than 20%?

Total cost of ownership

- Have you modeled TCO over 5 years, including: licenses, implementation, internal resources, training, integration, and ongoing support?
- What are the costs for additional modules you will need in years 2–3?
- How are upgrade cycles managed, and what is the typical cost and disruption level of a major version upgrade?
- Are there per-transaction or per-user costs that scale unpredictably with your business growth?

Independence and lock-in

- Can you export your data in standard formats at any time, without vendor involvement?
 - What happens to your data if you cancel the contract?
 - How dependent is the implementation on proprietary tools or methodologies that create SI lock-in?
 - Does the vendor have a history of acquiring and sunseting competing products in your space?
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Part 4 — Organizational readiness

Sponsorship and governance

- Is there an executive sponsor who is actively engaged — not just nominally assigned?
- Has a steering committee been constituted with decision-making authority?
- Is there a clear RACI for program decisions, including who can approve scope changes?
- Has IT leadership allocated realistic capacity for the program, or are key people expected to run the ERP project alongside their day jobs?

Change management

- Has a change impact assessment been conducted across all affected business units?
 - Is there a communication strategy for store operations, warehouse staff, and finance teams?
 - Has training been scoped with realistic timelines — not "two days before go-live"?
 - Is there a documented hypercare and stabilization plan for the first 90 days post go-live?
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Part 5 — Program structure and governance

Before signing

- Is the implementation scope fixed, or is the proposal structured as time-and-materials with no ceiling?
- Have you defined clear acceptance criteria for each phase and deliverable?
- Is there a change order process that prevents scope creep from being added without formal approval?
- Have you negotiated SLAs for support and issue resolution during go-live?

Ongoing governance

- Is there a governance model that keeps the vendor accountable without micromanaging?
 - Are there regular executive checkpoints with documented status reporting?
 - Is there an independent advisor or PMO that is not the implementation partner?
 - What is the escalation path when the vendor and your team disagree on scope or quality?
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About this checklist

This checklist was developed by Morris Stern, former VP of Retail Systems at Ashley Global Retail (Ashley Furniture), where he led ERP migrations, store systems transformations across 300+ locations, and unified commerce programs supporting ~\$3B in annual revenue.

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