

Odoo Implementation Checklist Guidance for Users

Where Companies Usually Overspend (Red Flags)

1. **Odoo App Overload**
 - a. Avoid implementing too many apps at once. Start with the core processes first.
2. **Customization Management (Lack of Management)**
 - a. **Customization without process clarity and documentation:** Different departments/roles might ask for features conflicting/creating process gaps.
 - b. **Lack of design/specification:** Studio fields and automated actions without governance can cause reporting gaps and performance issues
 - c. **Lack of considerations of long-term maintenance/upgrade cost:** minimizing customization for easier system maintenance and less script reviewing and testing before yearly upgrades
3. **Underestimating Internal Time and Change Management**
 - a. Every implementation quote is based on some assumptions of “what will be handled by the internal team” – need to make sure the internal team has the capacity

Questions to Ask Odoo Implementors

1. **How often do you see go-live date delays, and what are the typical causes?**
 - a. Go live delay could be costly as internal team lose faith and momentum
2. **Do you assign different processes owners by workflow (eg. order to cash, procure to pay, etc.)? If so, how do you make sure nothing fall through the cracks and the hand-off process among departments and roles are seamless?**
 - a. Different departments/roles might ask for features conflicting/creating process gaps
3. **What's your data import process? What's the responsibility of my team vs yours?**
 - a. Who cleans the data? → Who validates the data/balances? → Who performs trial imports to ensure accurate field mapping and data formats?
 - b. Data mistakes are one of the most common sources of costly rework
4. **Can we meet with the project team? Will the same team stay through go-live?**
 - a. It's important for the internal team to meet with implementation team and qualify them; the team change-over during the implementation process could be time-consuming and jeopardize the go-live date
5. **What assumptions are behind the proposal? What's in-scope vs out-of-scope?**
 - a. This is a way to make sure the price matches the value/effort, also to make sure the out-of-scope is something that the internal team has capacity to handle
6. **What work typically ends up costing more than expected? And how do you handle scope changes?**
 - a. This way the team can fully prepare for the discovery and internal resource line-up