

# The CEO's ERP Migration Playbook

## What to Ask, Check and Do When Replacing Your ERP System

Based on my 20+ years of real-world experience in the retail industry

Replacing your ERP system is one of the most underestimated CEO responsibilities in retail and consumer industries. The risk is real, and some examples are severe:

Take Target™, Revlon™ and Lidl™, three companies with massive resources and professional teams. When migrating their ERP systems, they faced severe failures

- disrupting operations,
- draining revenue
- and undermining customer trust.

As a former retail CEO, I had underestimated these risks myself.

I hadn't put the necessary counter-measures in place to course-correct before things went terribly wrong.

Together with a great team, we were forced to go through nerve-racking weeks of crisis management until we were able to restore normal business operations.

In practice, ERP failures don't happen because of technology.

They mostly happen because

- you, the CEO, don't ask the right questions early, and
- you miss what your employees already notice as clients leave, processes stutter or systems fail.

If you want your migration to succeed, use my step-by-step ERP migration plan. It makes your journey safer.

It shows you what to ask, what to look out for and what to do in each of the eight phases of your migration.

Need help? Schedule a free 30-minute appointment.

# The CEO's ERP Migration Playbook:

## Your Step-by-Step Plan

### Phase 1: Pre-Selection

At this stage, you and your team define the business case for your ERP transformation, before it even becomes part of your strategy. After all, it's a six- to seven-figure investment!

What to ask, what to check	What to do
<input type="checkbox"/> What business problem will this ERP solve? Agree on this with your board.	<input type="checkbox"/> Define measurable key performance indicators, create the necessary use cases and limit the project's scope.
<input type="checkbox"/> Which key processes must the new ERP be capable of?	<input type="checkbox"/> Write out a business case that contrasts benefits and risks.
<input type="checkbox"/> Which key performance indicators must improve: cost, speed, scalability, transparency?	<input type="checkbox"/> Prioritize ruthlessly: decide what isn't part of this project's scope.
<input type="checkbox"/> Which functions, processes are essential (must haves) vs. optional (nice to haves)?	

### Phase 2: Vendor selection

You are in this phase when selecting your future ERP system and your implementation partner. At the end of this phase, you will start signing the first contracts.

What to ask, what to check	What to do
<input type="checkbox"/> Does the software fit your business model, apart from looking good in the demo?	<input type="checkbox"/> Make explicit "fit" or "not a fit" decisions for each ERP solution you evaluate.
<input type="checkbox"/> How dependent (locked-in) will you be on the vendor?	<input type="checkbox"/> How flexible is the software to add your individual extensions? Can you integrate it with your own IT ecosystem?
<input type="checkbox"/> Is the implementation partner the right one for your company: capacity, seniority, culture?	<input type="checkbox"/> Call the vendor's reference clients yourself, without the vendor present.
<input type="checkbox"/> Where do they position me in their ABC customer ranking? And who is the highest escalation person on the partner's end when I have to step in on CEO level?	<input type="checkbox"/> Negotiate contracts focusing on roles, responsibilities, escalation, key performance indicators & exit rules.

## Phase 3: Project setup & control

In this phase, you assemble your team, including the project manager, his or her reports and a steering board.

What to ask, what to check	What to do
<input type="checkbox"/> Who is empowered and accountable internally to lead the project?	<input type="checkbox"/> Select a strong project manager for reporting, risk, cadence & decisions. If it's a team, make sure you select people from every hierarchical level. Define escalation paths, put them in writing.
<input type="checkbox"/> How do you balance between allowing your teams to make decisions while keeping project oversight and preventing scope creep?	<input type="checkbox"/> Install a real steering board with CEO presence.
<input type="checkbox"/> How many internal full-time employees do we really need to make this work? *	<input type="checkbox"/> Ensure that you have sufficient internal team members on board: Maintain a healthy ratio of internal to external (system vendor) experts per workstream.
<input type="checkbox"/> How do I make sure people accurately report progress, risks and needs for decision without fear?	<input type="checkbox"/> Ask clarifying questions, be curious and actually take decisions!

\* Here's why an externally driven project can be risky: the solution isn't co-designed with internal experts, so by the time you go live there isn't enough in-house knowledge. And of course, it becomes expensive because you're paying external consultants.

## Phase 4: System blueprint and design

In the blueprint & design phase, make process-by-process decisions about enforcing the new system's standards versus asking for software customization to fit your process.

What to ask, what to check	What to do
<input type="checkbox"/> Where do we stick to standard vs. customize?	<input type="checkbox"/> List which of your processes are giving you a competitive advantage.
<input type="checkbox"/> Which processes drive competitive advantage?	<input type="checkbox"/> For each (sub-)process, clarify if it needs to change to follow the new system's logic, or if the new ERP system must be customized to follow your own process.
<input type="checkbox"/> Which local variations put the template at risk?	<input type="checkbox"/> Ask for a business case that shows cost and benefit of an adoption, don't rely on shiny presentations.

## Phase 5: Build and develop

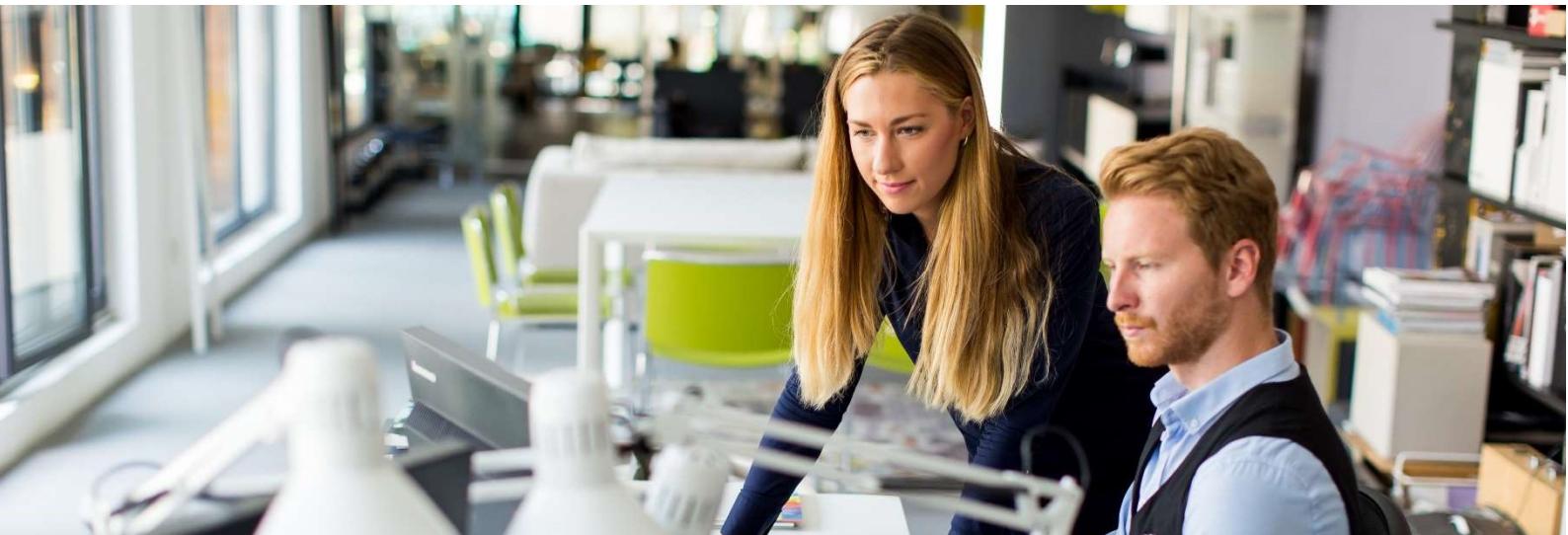
This is the period when your teams install software, configure settings, set up integrations, and customize processes in your **development environment**.

What to ask, what to check	What to do
Your status report might look good <input type="checkbox"/> on paper, but what is the real progress behind it?	Remove project blockers early, challenge status reports personally and frequently.
<input type="checkbox"/> What is the actual cost vs. the approved budget?	<input type="checkbox"/> Track your actual cost monthly against earned value
<input type="checkbox"/> What are the technical risk hot-spots?	<input type="checkbox"/> Ask for working demos, not slide decks.

## Phase 6: Test and migrate your data

In this phase, verify every critical process and data flow. Run end-to-end tests, validate key data, and ensure migrations reproduce results accurately in your **test environment**.

What to ask, what to check	What to do
<input type="checkbox"/> How often do we need to test, and which systems?	<input type="checkbox"/> Review test cases live — not just percentages.
<input type="checkbox"/> Which test cases are truly critical? Are they populated with real data?	<input type="checkbox"/> Demand complete end-to-end test cycles before locking dates.
<input type="checkbox"/> How many full end-to-end test runs have we completed?	<input type="checkbox"/> Ask for fallback plans for your migration (Have a Plan B and C!).
<input type="checkbox"/> Does an example client order come out the same way in the new system as it did in the old one?	<input type="checkbox"/> Get independent validation of migration quality.



## Phase 7: Reach go-live readiness

In this phase, your teams need to use checklists and tick them off - item by item - before you can even think about switching over to the new ERP system.

What to ask, what to check	What to do
<input type="checkbox"/> Are we truly ready for the switch to the new ERP system, or just on paper?	<input type="checkbox"/> Decide boldly against go-live if true showstopper issues are in the way.
<input type="checkbox"/> Are people afraid to say what's not working when we are testing?	<input type="checkbox"/> Demand a real go/no-go matrix with hard criteria about everything that is still open after your last tests.
<input type="checkbox"/> What concerns are the stores, logistics, and finance teams raising in the moment before migration?	<input type="checkbox"/> Assign crystal-clear hypercare ownership in all business functions to ensure quick resolution of arising issues.
<input type="checkbox"/> What will be different for suppliers, customers and business partners after your go-live?	<input type="checkbox"/> Ensure all external processes and touchpoints are checked off and be prepared to communicate swiftly to outside stakeholders in case of unforeseen issues.

## Phase 8: Hypercare phase

This is the period after your new system goes live. All error logs must be active, and you need to monitor operations and be available to resolve issues.

What to ask, what to check	What to do
<input type="checkbox"/> Which issues are escalating from the field? Examples: Customer calls, vendors cannot log in, we cannot deliver certain goods or services.	<input type="checkbox"/> Be visible: call stores, logistics, finance daily during the first days after go-live for first-hand insights.
<input type="checkbox"/> What impact do we see on customers, lead times and our own cashflow?	<input type="checkbox"/> Prioritize problems by business impact, not project logic.
<input type="checkbox"/> How accurate are your accounting and analytics from day 1 after go-live?	<input type="checkbox"/> Run analytics daily, and expect the first two month-end reporting cycles after go-live to be laborious.
<input type="checkbox"/> Expect the team to be exhausted and more than deserving of recognition latest by this point.	<input type="checkbox"/> Throw a big go-live party!

## Key takeaway: You have to focus on one thing

The most influential factor in your ERP migration won't be technology. It will be the social dynamics within your teams. The main risk is unhealthy team dynamics, which can show up as

- distrust,
- conflict and blame,
- avoiding responsibility,
- loss of commitment,
- and poor results.

Of these, the fear of speaking up can become the biggest trap. The trust aspect will make or break your project and your career.

This is why your task is to strengthen trust and safety for your team to speak up: Be human, encourage productive debate, ensure people commit to tasks they will be able to handle.

How will you transform your retail business to meet tomorrow's customer demands?

Hi,

I am Ingo Winterhoff. I am a trusted advisor for CEOs who want real, measurable results in the form of profitable growth and strong employee retention.

I have gathered over 20 years of international leadership experience

- at global corporations such as adidas and Reebok,
- as CEO of a mid-sized e-commerce company,
- and as a business consultant in the furniture, building materials, sporting goods and apparel industries.

I am looking forward to hearing from you.



Migrating? Schedule a free 30-minute appointment.

„Ingo has led impressive transformations both within corporate structures and as the CEO of an international e-commerce company — commercially and culturally, with strategic clarity, heart, and genuine leadership strength.

As a multilingual, versatile business leader, he stands out for his reliability, vision, and real impact.”

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