

FREE CHECKLIST

# The Odoo Implementation Checklist

21 checkpoints across 7 phases, from discovery to post-go-live. Free to use, with or without us.

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# How to use this checklist

Work through the phases in order. Every line is checkable. This is deliberately not vendor-specific — it works for any serious Odoo implementation, whichever partner you work with.

## PHASE 1

### Discovery & Planning

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- ☐ **Define Clear Goals.** Set specific, trackable objectives before scoping the project further, so success can actually be measured.
- ☐ **Appoint Project Champion.** Give one person real decision-making authority to prevent small approvals from stalling for weeks.
- ☐ **Select Core Modules.** Focus on today's most urgent pain points, not every option available, to control cost.

## PHASE 2

### Process Design & Configuration

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- ☐ **Map Real Workflows.** Document existing processes exactly as staff perform them today, including informal daily workarounds nobody documented.
- ☐ **Prioritize Standard Features.** Use Odoo's out-of-the-box functionality first, and customize only where it truly differentiates the business.
- ☐ **Set User Permissions.** Configure role-based access before any real records enter the system, to protect sensitive data early.

## PHASE 3

### Data Migration Strategy

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- ☐ **Clean Data First.** Remove duplicate, inactive, and outdated records from source systems before migrating anything at all.
- ☐ **Map Fields Manually.** Handle records like the chart of accounts by hand, since automated tools miss business logic.
- ☐ **Run Trial Migration.** Verify a sample of migrated records against source data before scaling to the full set.

## PHASE 4

### Testing & User Acceptance (UAT)

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- ☐ **Test Modules Individually.** Validate each workflow in isolation before combining them into longer, more complex end-to-end processes.

- ☐ **Run Full Scenarios.** Follow one order from quotation through invoicing and delivery to confirm accurate cross-module data flow.
- ☐ **Require UAT Sign-Off.** Get formal, written approval from every department involved, not just IT, before scheduling go-live.

#### PHASE 5

### User Training & Change Management

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- ☐ **Train By Role.** Focus each session on real daily tasks, not generic system demos that cover everything loosely.
- ☐ **Communicate Early Clearly.** Share exactly what's changing, and when, starting at least two weeks before launch day.
- ☐ **Plan For Resistance.** Identify likely resistant teams early and involve their managers as visible champions of the system.

#### PHASE 6

### Go-Live Execution

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- ☐ **Document Cutover Plan.** Assign a specifically named owner responsible for every single step involved in the launch.
- ☐ **Rehearse Rollback Plan.** Prepare it fully before launch day arrives, not during an unfolding live production crisis.
- ☐ **Time Launch Carefully.** Avoid month-end financial close or peak seasonal periods, when teams have no slack to spare.

#### PHASE 7

### Post-Go-Live Support & Optimization

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- ☐ **Run Hypercare Period.** Stay on standby for the first two to four weeks after launch to resolve issues fast.
- ☐ **Monitor Real Usage.** Track actual adoption patterns closely to catch gaps that technical uptime monitoring alone would miss.
- ☐ **Treat Optimization Ongoing.** Revisit business KPIs quarterly and expand modules only once current workflows are fully stable.

## **Most rollouts don't fail across all seven phases.**

They stall on one. Usually the same one, revisited a month later, once it's already caused a delay.

If you went through this list and one phase felt thinner than the rest — that's not a guess, that's data. Worth a second look before it becomes a go-live problem instead of a planning note.

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