

PROFITEDGE KIT · ADMINISTRATION

Conversion Readiness Kit

For the owner's side of a DMS, ERP or point-of-sale conversion. The vendor runs the software. This is for running the business side: the decisions, the data, the testing and the weeks after go-live.

Moving to

Planned go-live

Business-side owner

Vendor contact

1 Six phases, each with a gate

Something has to be true before the project moves on. Write down who signs off.

PHASE	HAS TO BE TRUE BEFORE MOVING ON	OWNER	DONE
01 Operational readiness	Goals and requirements written down. Decision owners agreed. Risks listed.		☐
02 Process and data	Workflows written down. Data owners named. Cleanup plan agreed.		☐
03 Decisions and configuration	Every setting traced to a written decision with a name against it.		☐
04 Training and testing	Real scenarios tested end to end. Each person trained for their role.		☐
05 Cutover	Go and no-go criteria agreed in advance. A plan for what happens if something goes wrong.		☐
06 Stabilization	Workarounds listed and removed. Reports checked against reality.		☐

2 Clean the data before it moves

A conversion copies what's there.

DATA	OWNER	CLEAN BY	DONE
Duplicate and inactive customers			☐
Superseded and obsolete part numbers			☐
On-hand quantities that haven't been counted			☐
Old vendors and out-of-date price files			☐
Open orders, deposits and work orders that should be closed			☐
Account balances nobody can explain			☐

Every setting is a business decision. Write down what was decided, why, and who decided it. For example: how parts are priced, which account a deposit goes to, who can approve a return and up to what amount.

4 Test the business, not the buttons

Run real scenarios from a normal week from start to finish, and follow each one through to month-end.

SCENARIO	RAN END TO END	RIGHT AT MONTH- END	ISSUE AND OWNER
A special order with a deposit, picked up a month later	☐	☐	
A warranty repair with parts	☐	☐	
A return on last season's sale	☐	☐	
A commercial account on terms	☐	☐	
A cycle count	☐	☐	

5 Ready to go live?

Agree this before the day, then stick to it. Postponing is a legitimate outcome.

- ☐ Every scenario above has passed
- ☐ Data cleanup signed off
- ☐ Who's on hand the first week is agreed
- ☐ Each person trained for their role
- ☐ A plan for what happens if something goes wrong
- ☐ Who makes the go or no-go call is agreed

6 The first weeks after go-live

WORKAROUND OR REPORT TO CHECK	OWNER	FIXED BY	DONE

Conversions rarely fail at go-live. They fail at a decision made three months earlier that nobody wrote down.

WANT A SECOND SET OF EYES?
Start a conversation at profitedgesystems.com about the owner's side of your conversion.