EXECUTIVE CLARITY · DISCOVERY CHECKLIST

The two-week ERP discovery — the checklist

Work through this with your own team before any partner proposal frames the answers. Two weeks, four decisions, then a proposal — commercials come after the decisions, never during.

Five questions for the first executive session

- [ ] **Deadline reality.** Which EHP level are we on — and do we know our real maintenance end-date?
  EHP 0–5 mainstream maintenance has already ended; your enhancement-pack level, not the marketing date, sets your clock.
- [ ] **Custom-code debt.** What share of our custom code is actually executed — and who pays its upgrade tax today?
  Every core modification is repaid at every release, in retest effort and upgrade delay.
- [ ] **Licensing readiness.** Can anyone in the room explain what one FUE is, or map our roles to the new user types?
  Private Cloud sells capacity (FUEs); Public Cloud sells business roles. The mechanics shape cost and flexibility for years.
- [ ] **Data & AI ambition.** Which AI use case survives the three filters — reliable data, a weekly task removed, wrong answers noticed?
  A use case with three good answers is a pilot; with none, it is a slide.
- [ ] **Benefit ownership.** Who owned the benefits of our last ERP investment — by name, in their targets?
  The organisations disappointed by ERP ROI are almost always the ones that never defined it.

Four decisions discovery must produce

- [ ] **Deployment model** — Public or Private, RISE or GROW, decided on suitability and evidence.
- [ ] **Business case v1** — five lines, measured baselines, a named owner per benefit line.
- [ ] **Scope hypothesis** — what fits the standard, where real deviations are, whether a fixed-scope package can carry it.
- [ ] **Governance setup** — steering structure, decision rights and quality-gate calendar, before the first workshop.

Guardrails

- [ ] Every scope dimension of any packaged offer is stated in writing: processes · organisation · integrations · data · enablement.
- [ ] The exclusions list exists — and we have read it. No exclusions list means we write one and ask for a signature.
- [ ] The model decision is validated independently of whoever profits from it.

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