

ERP Implementation Checklist

10 Pitfalls to Avoid in Microsoft Dynamics 365 Finance

At FitGap Finance, we help finance and operations teams bridge the gap between business needs and ERP capabilities — without unnecessary complexity. Use this checklist to keep your D365 project on track, on budget, and stress-free.

1. Unclear Scope

- ☐ Have a Fit/Gap analysis completed and approved by stakeholders.
- ☐ List all in-scope modules, entities, and integrations.
- ☐ Confirm the 'out of scope' list as well — equally important.

2. Relying Too Much on External Consultants

- ☐ Identify internal team members with prior ERP experience.
- ☐ Assign internal ownership for each functional area.
- ☐ Set up a knowledge transfer plan with consultants.

3. Key Users Not Fully Assigned

- ☐ Backfill operational roles before the project starts.
- ☐ Give key users at least 50–100% allocation to the project.
- ☐ Ensure they attend all design, testing, and training sessions.

4. Weak Change Management

- ☐ Involve key players early in decision-making.
- ☐ Communicate the 'why' behind each change.
- ☐ Use demos and prototypes to build buy-in.

5. Excessive Customizations

- ☐ Challenge every customization request.
- ☐ Check if D365 has out-of-the-box functionality to meet the need.
- ☐ Document customization impacts on future upgrades.

6. Analysis Paralysis

- ☐ Limit the number of design workshops.
- ☐ Get users into a test environment quickly.
- ☐ Refine requirements based on hands-on feedback.

ERP Implementation Checklist (continued)**7. Delaying Data Migration**

- ☐ Start migration work early with key datasets.
- ☐ Perform data cleanup in parallel with process design.
- ☐ Validate migrated data within the D365 configuration.

8. Leaving Security Roles to the End

- ☐ Identify critical risks at the start.
- ☐ Set up basic security controls for go-live.
- ☐ Plan role refinements post-launch.

9. Poor Testing Practices

- ☐ Create end-to-end test cases that follow real business scenarios.
- ☐ Run multiple test cycles.
- ☐ Give testers time to understand both processes and the system.

10. Skipping Dry-Runs and Parallel Runs

- ☐ Conduct at least one full dry-run.
- ☐ If possible, run in parallel with the legacy system.
- ☐ Use results to address issues before go-live.