

IMPLEMENTATION PREPARATION

Odoo Readiness Checklist

Make the business scope, owners, data, and constraints visible before committing to an implementation. Use this workbook with the sponsor, process owners, technical contact, and representative users.

01 Purpose

Choose a clear first release.

02 Evidence

Keep unknowns visible.

03 Decision

Plan with named owners.



A practical, evidence-led guide for business owners and teams

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01 / SCOPE AND GOVERNANCE

Agree on purpose and decision ownership

Start with business outcomes and decision rights. The checklist is an original InnovanSIS planning aid, not an official Odoo assessment, certification, quote, or guarantee of fit.

R01	Business problem	One business problem and its impact are described with a representative example.
R02	First release	In-scope workflows, exclusions, outcomes, and dependencies are written down.
R03	Sponsor	One person can approve priorities, scope changes, and project decisions.
R04	Process owners	Each critical workflow has an owner who can confirm rules and exceptions.
R05	User availability	Key users have time for workshops, data preparation, testing, and training.
R06	Acceptance criteria	Business scenarios and the person authorized to accept them are identified.
R07	Investment boundaries	Implementation, licenses, hosting, integration, maintenance, and internal effort are considered separately.
R08	Change control	A route exists to assess new requirements and defer work to a later release.

PREPARATION GATE

Resolve the sponsor, process owners, and first-release scope before committing to a fixed implementation plan.

MOST IMPORTANT UNRESOLVED DECISION / OWNER / DUE DATE

02 / DATA AND DEPENDENCIES

Prepare data and confirm solution fit

Data quality, platform fit, integrations, access, and hosting shape both the implementation plan and the transition risk. Mark an item unknown when evidence is missing.

R09	Record inventory	Records to migrate are identified: contacts, products, open orders, balances, attachments, and required history.
R10	Data quality	Samples cover required fields, duplicates, naming, units, and references; cleanup owners are assigned.
R11	Migration proof	Mapping, sample reconciliation, and business sign-off are defined; counts alone are not proof.
R12	Edition and modules	Critical needs map to the intended Odoo version, edition, and modules; licensing and maintenance are checked.
R13	Extensions	Custom and third-party modules, source availability, maintainers, and compatibility assumptions are known.
R14	Integrations	Each connection has data ownership, direction, timing, failure handling, vendor access, and charges defined.
R15	Permissions	Roles and record/action access are listed, including denial tests and company boundaries where relevant.
R16	Deployment	Hosting responsibility, environment access, recovery needs, and change authorization are confirmed.

PLATFORM FIT IS A PROJECT DECISION

Verify the actual edition, modules, extensions, licenses, integrations, and hosting arrangement. Do not infer feature availability from a product name.

HIGHEST-RISK DEPENDENCY / EVIDENCE NEEDED / RESPONSIBLE PERSON

03 / TEST, ADOPT, AND TRANSITION

Prepare acceptance and daily operation

A workable transition depends on rehearsed business scenarios and recovery evidence. Name who will perform, verify, and accept each critical activity.

R17	Test environment	An isolated rehearsal environment is planned; sensitive data and outbound actions are controlled.
R18	Real scenarios	Tests cover normal work, exceptions, permissions, documents, integrations, and financial reconciliation where relevant.
R19	Role-based learning	Training and task guidance match real user work; attendance alone is not acceptance.
R20	Cutover ownership	Data freeze, final transfer, validation, communication, and go/no-go decisions have named owners.
R21	Recovery plan	Backup scope, restore verification, rollback criteria, and acceptable recovery objectives are defined.
R22	Stabilization	Support channel, coverage, escalation, issue ownership, and initial follow-up period are agreed.

ACCEPTANCE TEST EXAMPLE

A sales user creates an order from approved customer and product data; the required approval occurs; a user without approval rights cannot release it. Adapt this to the agreed first release.

WRITE ONE ACCEPTANCE TEST

ROLE + STARTING RECORDS _____	ACTION + EXPECTED OUTCOME _____
EXCEPTION + EXPECTED RESPONSE _____	EVIDENCE + ACCEPTING OWNER _____

04 / DECISION AND PREPARATION BACKLOG

Make the readiness decision explicit

Review every gap and unknown in relation to the decision it blocks. This is a workshop rule, not a maturity score; a planning decision does not approve production launch.

DECISION	USE WHEN
Proceed to scoped planning	Sponsor, process ownership, first release, and acceptance approach are evidenced; remaining dependencies have feasible owners and plans.
Proceed with conditions	Planning may continue, but named conditions must close before the affected work begins.
Pause commitment	Ownership, critical fit, access, source data, or recovery needs are unknown enough that scope or transition cannot be responsibly committed.

DO NOT APPROVE PRODUCTION LAUNCH WITH UNRESOLVED CRITICALS

Critical acceptance failures, unauthorized data exposure, unvalidated critical migration results, no agreed recovery route, or no accountable go/no-go owner.

PREPARATION BACKLOG

GAP / ID	NEXT EVIDENCE OR ACTION	OWNER / DUE	CLOSURE PROOF

SELECTED DECISION / SPONSOR / REVIEW DATE / CONDITIONS

Review references: Odoo official documentation at odoo.com/documentation. Criteria in this workbook are an original InnovanSIS framework.

Bring the evidence to an implementation readiness conversation.

INNOVATION & SYSTEMS

From business vision to intelligent execution

InnovanSIS helps organizations turn business priorities into clear processes, capable teams, and connected technology.

WHO WE ARE

A practical partner for better operations

We start by understanding how work moves through the business. Then we help shape the processes, responsibilities, and systems that make execution easier to see, manage, and improve.

01

Clarify the work

Map the handoffs, decisions, and information your team needs to deliver consistently.

02

Connect the system

Use Odoo ERP to bring core workflows and business information into a shared operating environment.

03

Enable the team

Give people practical roles, routines, and guidance to put the new process into daily use.



ODOO ERP

Technology should support the way work needs to happen.

InnovanSIS approaches Odoo as an adaptable platform for connected operations. The focus is on fit: define the process, configure the system around it, and help the team adopt it.

"Every great business starts with a vision, a vision to make profits, to innovate, a vision to grow, and to make a lasting impact. But the truth is, a vision alone is not enough. Success comes when we transform that vision into action, fueled by streamlined processes, empowered teams, and smart technology. That's where Odoo ERP becomes a game-changer. It's not just software; it's a gateway to operational excellence."

Armando Robert Lobo
Founder & CEO, InnovanSIS LLC

