

URL: /erp-migration

Alternative Title Ideas:

- The Complete Guide to Successful ERP Migration
- How to Conduct ERP Migration Successfully
- ERP Migration: What, When, and How
- ERP Migration 101: The Only Guide You'll Ever Need

Meta Description:

Conduct a successful ERP migration and ensure a smooth transition for your business with the tips and insights in this guide.

How to Complete ERP Migration Like a Pro

ERP migration is a complex and delicate process.

One small mistake, and you may find yourself putting out fires all day instead of focusing on revenue-driving tasks. That's why I wrote this guide: to avoid that.

So whether you're upgrading from an old ERP or adopting one for the first time, you're in the right place.

Let's start with the basics.

What Is ERP Migration?

ERP migration means moving your business data, systems, and workflows from one ERP system to another. It also covers merging tools or shifting processes from external systems into a new ERP.

Migrating to an ERP typically involves:

- Extracting data from your old system.
- Transforming the data to fit the format and structure of the new ERP.
- Loading the data into the new ERP software.

And despite how it sounds, ERP migration goes beyond transferring data. It also requires reconfiguring workflows, retraining users, and integrating with other tools. You may even need to rethink how departments collaborate.

ERP Migration vs ERP Conversion

ERP migration is the general term for any transition to a new ERP. This could be moving from a legacy solution, combining several tools into one, or changing to a new vendor.

ERP conversion is a complete shift from one vendor's system to another, e.g., from Oracle to SAP. It involves rebuilding business processes and moving data and settings from an old ERP to a new one.

ERP migration is the umbrella term, while ERP conversion is a type of migration.

The Characters in ERP Migration

ERP migration is not a solo effort—several stakeholders must collaborate for it to work.

- **CFOs & finance leaders** oversee costs, ensure financial compliance, and [support ERP reporting](#).
- **IT teams** handle ERP implementation and system configuration. They're also responsible for data mapping, extraction, transformation, loading, and testing.
- **ERP vendors or consultants** provide software know-how and user support. More often than not, they also lead migration efforts.
- [ERP project managers](#) coordinate communication, define timelines, and track progress.
- **Department leads or managers** represent each team's unique needs and validate data. They also support testing and training initiatives.
- **End users** help test workflows and provide usability feedback.

When ERP Migration is Necessary (or Inevitable)

ERP migration becomes inevitable when you're trying to do one or more of these:

- Replace outdated, obsolete, redundant, or legacy systems (ERP or not)
- Consolidate siloed systems.
- Improve data accuracy and eliminate inaccuracies or redundancies across teams.
- Scale business operations in a way existing systems can't.
- Move to a more compliant setup.
- Access better reporting features.

The table below shows how these ERP migration scenarios play out in real life.

Scenario	Why ERP Migration is Necessary
Existing systems (ERP or not) are outdated, obsolete, redundant, or legacy	Older systems often lack support, pose security risks, and can't meet modern business needs.
Teams use different tools, and their data is siloed	Disconnected tools slow collaboration, create confusion, and lead to double work.
Business data is inaccurate, inconsistent, or redundant across teams	Poor data quality causes bad decisions and wastes time on manual cleanups.
Current systems can't scale with business growth	As a business grows, limited systems slow things down. Cracks start to show, and teams rely on clumsy workarounds to keep things moving.
Compliance or audit requirements have changed	Outdated systems may not meet new regulatory standards, putting you at risk of non-compliance or failed audits.
There's a need for better reporting and insights	Performance tracking and strategic planning are harder without advanced reporting tools.

ERP migration should top your to-do list if you're in any of the above situations.

6 Steps for a Successful ERP Migration

Move your operations to a modern ERP system and ensure minimal disruptions with this 6-step migration guide. ([Skip to the checklist](#))

1. Outline Your Requirements

Every [successful ERP migration](#) begins with business needs. Are you seeking better supply chain visibility and real-time analytics? Or is your focus on improved customer relationship management (CRM) and regulatory compliance?

Clearly define your ERP migration requirements with these proven steps:

- **Interview department heads** to understand their existing data, processes, and pain points.
- **Note industry-specific regulations** that your ERP must align with.
- **Document the datasets you'll be migrating**, where they currently live, and your plan to clean them.
- **Outline system speed, uptime, and reporting goals** to track performance effectively.
- **List all the tools your ERP needs to integrate with**, e.g., CRMs or payroll software.

“When defining ERP migration requirements, work with IT to set realistic expectations and avoid costly surprises down the line.”

2. Choose Your Vendor

Your ERP provider can make or mar the data migration process, so don't take this step lightly. [Choose the right ERP vendor](#) with these 10 key selection criteria:

- **Business Needs and Functionality.** Ensure the ERP fixes the issues that triggered the migration.
- **Budget and Resources.** Know and plan for the full migration cost, from the system to the people running it.
- **Internal Support.** Get the backing of company execs and employees to limit resistance post-implementation.
- **Integration.** Check that the system will integrate easily with your current tools.
- **Cost Efficiency.** Weigh the total cost of ownership (TCO) against potential ROI to ensure your ERP pays off long-term.
- **Vendor Reputation and Support.** Look for a vendor with a proven track record and strong migration support, during and after.
- **Implementation Time and Complexity.** Find out how long migration will take and how complex it'll be. [Cloud ERPs](#) or hybrid systems are more modern and flexible than their on-premise alternatives.
- **User Adoption, Training, and Support.** Choose a vendor that offers in-depth training resources and ongoing support to ease your team's transition.

- **Customization, Maintenance, and Security.** Confirm that the ERP is easy to customize and secure enough to protect your business data.
- **Scalability.** Go for an ERP solution that can grow with your business without breaking or slowing down.

[Check out some of our top ERP software options here](#)

Before making your final decision, check out case studies and speak directly with past clients. It's also a plus if the vendor provides a sandbox environment to test core features risk-free.

3. Build Your Strategy

Now it's time to strategize. A strong ERP migration project plan outlines exactly how you'll move from your current system to the new one. It limits risk, aligns stakeholders, and improves your chances of success.

Start by defining the scope, budget, and timeline of your migration. Then, break your data migration strategy into phases:

- **Data Management:** Gather, identify, and analyze all available data. Anticipate challenges like data loss or downtime. Create contingency plans for high-impact scenarios.
- **System Analysis:** Audit existing workflows, data formats, and pain points. Identify gaps between legacy ERPs and the new system's functionality.
- **Integration Strategy:** Plan how the ERP will connect with third-party tools (e.g., CRM app or supply chain software) to avoid data silos.
- **Roadmapping:** Set clear milestones—like data extraction, testing, and go-live—and due dates to stay on track.

“Make your ERP migration plan a living document. Update it as needed and give key stakeholders access to keep them informed.”

Use [project management tools](#) like Wrike or Hubstaff to assign tasks, track progress, and ease collaboration.

4. Loop In Your Team

Truly transformative ERP migrations depend on team members. People need to know what's happening and feel like you consider them during decision-making.

Some questions you may need to answer include:

- When does the migration begin?
- How and when will training start?
- Who should report issues during testing?
- What's the go-live date?
- Will I lose access to past reports?
- Will this change how we send and get approvals?

Address these questions and others by creating an organized communication plan. Next, identify who needs what kind of training and set up feedback channels. This way, you can keep everyone up to date, train them effectively, and flag any issues before going live.

5. Execute the ERP Migration

The ERP migration execution is where you turn your project plan into action, from kickoff to testing and go-live. It involves:

- **The Kick-off Meeting.** Here, the project team reconfirms timelines, responsibilities, and key deliverables.
- **Configuration.** Set up the new ERP, customize modules, and define workflows for different teams.
- **[Data Cleansing](#).** Remove outdated, incomplete, or duplicate data before you begin the data transfer.
- **ERP Data Migration.** Move your business data from various sources into the ERP system. Automate the process with migration tools or use an Extract-Transform-Load (ETL) framework with scripts.
- **Data Validation and Audit Trailing.** After loading the data, confirm that you transferred all records correctly and that they work as planned in the new environment. Keep logs of every dataset you moved, changed, or corrected so you can revisit them if there are any inconsistencies.
- **[ERP Testing](#).** After migration and validation comes testing. But instead of jumping to using real data, test with sample inputs. Say your company is into furniture production. Try basic tasks like invoice creation, then move to more complex, multi-department processes like order fulfillment. Fix any identified issues before moving forward.

“Testing and grading throughout ERP migration is mission-critical. Testing ensures everything works smoothly before rollout. Meanwhile,

grading assesses your business's readiness, the quality of the data transfer, and the implementation's success at key stages."

- **Training Sessions:** Organize live and recorded training to ensure user readiness and drive adoption.
- **Change Freeze Period:** Lock changes to the old system at the tail-end of the migration to avoid duplicate data. Only then can you roll out the new ERP and begin using actual transaction details.

6. Manage Your ERP (And Your Team)

Go-live doesn't mean go home. Post-migration and implementation, you must monitor the ERP's performance, collect feedback, and provide ongoing user support.

Ensure your ERP system meets its requirements—and catch issues before they spiral—with these best practices:

- Set up reporting dashboards to track system uptime, error logs, and speed.
- Host office hours with open Q&A sessions where users can flag issues and get help.
- Create a dedicated feedback email or form for users to log bugs and friction points.
- Note all comments and feedback in a central document to track user sentiment and plan system tweaks.
- Run refresher or follow-up training sessions to clarify common confusions and cover edge cases.
- Review data flows, backups, and integrations regularly to maintain system health.

ERP Migration: Timeline and Costs

ERP migration timelines and costs depend on your current setup, team expertise, data integrity, and the new system's complexity.

ERP Migration Timeline

I've found that:

- Small to mid-sized businesses (SMBs) typically spend 3 to 9 months on ERP migration.
- Large enterprises may need 12 months or more for ERP migration. This longer timeframe is due to their data volume, tiered user permissions, and integration dependencies.

For example, requirements gathering may take 2 weeks for an SMB and 1 month for a multinational. At the same time, a startup might spend a week on user training while an enterprise firm could use up to 2 months.

Note: Timelines for different ERP migration phases—like testing and training—often overlap.

ERP Migration Costs

For SMBs, an ERP migration can cost anywhere from \$10,000 to \$150,000. But for larger enterprises, costs start at around \$200,000 and can go well beyond \$1 million.

These cost estimates include upfront ERP licensing fees and integration expenses. They also cover data migration tools, human capital, training, documentation, and ongoing support.

Key Factors That Affect ERP Migration Pricing

- **Data Volume and Complexity.** Cleaning, mapping, and transforming large datasets is time-consuming.
- **Legacy System Limitations.** Older ERPs may require extra work for compatibility.
- **Number of Users.** More users often mean more licenses, training, and onboarding hours.
- **Customization Needs.** The more you want to tailor the new ERP system to your workflows, the higher the cost.
- **Integration Scope:** ERPs often need to sync with CRMs, HR systems, payroll tools, and supply chain software.

Common ERP Migration Challenges

Here are three of the biggest ERP migration challenges you might face—and how to solve them.

1. Data Quality Issues

Issues like outdated records and inconsistent formatting can cause downstream errors in the new ERP. And until it's time to migrate, you may underestimate how messy your business's historical data *really* is.

Say your vendor master list contains different spellings or old addresses for the same supplier. These inconsistencies end up as duplicate entries in your ERP database.

Avoid this scenario by cleaning and standardizing your master data pre-migration. Merge duplicates, update obsolete records, and use uniform formatting across fields.

2. Inadequate Testing

Rushing through or skipping testing means you can't verify if the new ERP works as planned.

Post-rollout, you may find that invoices don't sync well in your [finance ERP](#) because of incorrect field mapping. You could also discover duplicate employee records due to mismatched ID fields. A simple test beforehand would have caught such issues earlier.

Unsure what type of tests to do? Check out the [different types of ERP tests and when to use them](#).

3. Low User Adoption

No matter how *perfect* an ERP system is, it will fail if employees don't use it.

And change resistance happens for many reasons, from inadequate training to clunky software and poor migration communication. For example, sales teams may keep using spreadsheets for deal management if they didn't get proper onboarding.

Drive user adoption and retention with proper training, intuitive user interfaces, and a structured communication plan.

Best Practices for ERP Migration

ERP migration best practices are a dime a dozen, but these are my 9 top tips to help ease the process:

- **Start Testing Early.** This way, you can find and fix issues quickly.
- **Continuously Test During Migration.** Validate data and system functionality at each migration phase, not just at the end.
- **Automate Data Cleaning.** Simplify and speed up [data cleaning](#) with Python, statistical analysis software, or vendor-provided tools.
- **Assign a Dedicated Migration Team.** Define who's responsible for data governance, workflows, and testing so everything runs smoothly.
- **Document Your Field mappings.** Don't rely on memory. Keep a detailed record of every old-to-new data field transformation.

- **Communicate Consistently With Users.** Send regular updates, invite feedback, and explain how the migration affects daily operations.
- **Run Pilot Programs.** For example, let a single department try out the new ERP before full rollout.
- **Track and Resolve Post-launch Bugs Fast.** Set up triage channels to collect, prioritize, and fix issues quickly.
- **Create a Rollback Strategy:** Prepare a contingency plan in case you need to pause or reverse go-live for any reason.

ERP Migration Checklist

Conduct ERP migration like a pro with this handy checklist.

Phase	Key Tasks
1. Outline Your Requirements	☐ Interview department heads to understand processes and pain points. ☐ Note industry-specific regulations. ☐ Document datasets to migrate and data cleaning plans. ☐ Outline speed, uptime, and reporting goals. ☐ List the tools the ERP must integrate with.
2. Choose Your Vendor	☐ Match ERP options with your business needs. ☐ Define full migration cost and check available resources. ☐ Secure internal support from leadership and staff. ☐ Confirm system integration compatibility. ☐ Compare TCO with expected ROI. ☐ Evaluate vendor reputation and post-go-live support. ☐ Understand the timeline and complexity of implementation. ☐ Check training materials and support options. ☐ Ensure the ERP is customizable and secure. ☐ Verify the scalability of the system. ☐ Review case studies and speak with past clients. ☐ Ask for sandbox access to test features.

3. Build Your Strategy	☐ Define migration scope, budget, and timeline. ☐ Plan data management strategy and backups. ☐ Audit current workflows and identify system gaps. ☐ Map out third-party integrations. ☐ Set milestones (e.g., testing, go-live) and deadlines. ☐ Use a project management tool to assign tasks and track progress.
4. Loop In Your Team	☐ Create and share a communication plan. ☐ Answer key team questions about the migration timeline, training, access, etc. ☐ Identify training needs by role or department. ☐ Establish feedback and issue reporting channels.
5. Execute the ERP Migration	☐ Hold a kickoff meeting to confirm roles and timelines. ☐ Configure ERP modules and workflows. ☐ Clean outdated or duplicate data. ☐ Transfer data using tools or ETL frameworks. ☐ Validate migrated data and keep audit logs. ☐ Test basic to complex ERP functions with sample inputs. ☐ Fix issues before go-live. ☐ Organize live and recorded training. ☐ Freeze changes on the old system. ☐ Go live with the new ERP and use real data.
6. Manage Your ERP and Team	☐ Monitor system uptime, error logs, and performance. ☐ Host open Q&A sessions post-go-live. ☐ Create a feedback form or email for users. ☐ Log and track all feedback in one place. ☐ Offer follow-up or refresher training. ☐ Review integrations, backups, and workflows regularly.
7. Define Timelines and Costs, and Anticipate Challenges	☐ Estimate timeline: 3–9 months (SMBs), 12+ months (enterprises). ☐ Budget for costs: \$10k–\$150k (SMBs), \$200k+ (enterprises). ☐ Factor in data volume, user count, integrations, and customizations. ☐ Address key challenges: data quality, testing gaps, and user adoption.

	☐ Follow best practices: early testing, pilot rollouts, clear field mapping, dedicated teams, and rollback strategy.
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ERP Migration: The Pulse of Every Implementation

A smooth ERP migration sets the tone for everything that follows, from user adoption to long-term ROI. Beyond transferring data, it's about moving your business forward with intention.

So audit your current systems, involve your team, and prioritize clean data. Also, test like your business depends on it—because it does.

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ERP

How to Complete ERP Migration Like a Pro



By Kianna Walpole

on Jun 5, 2025

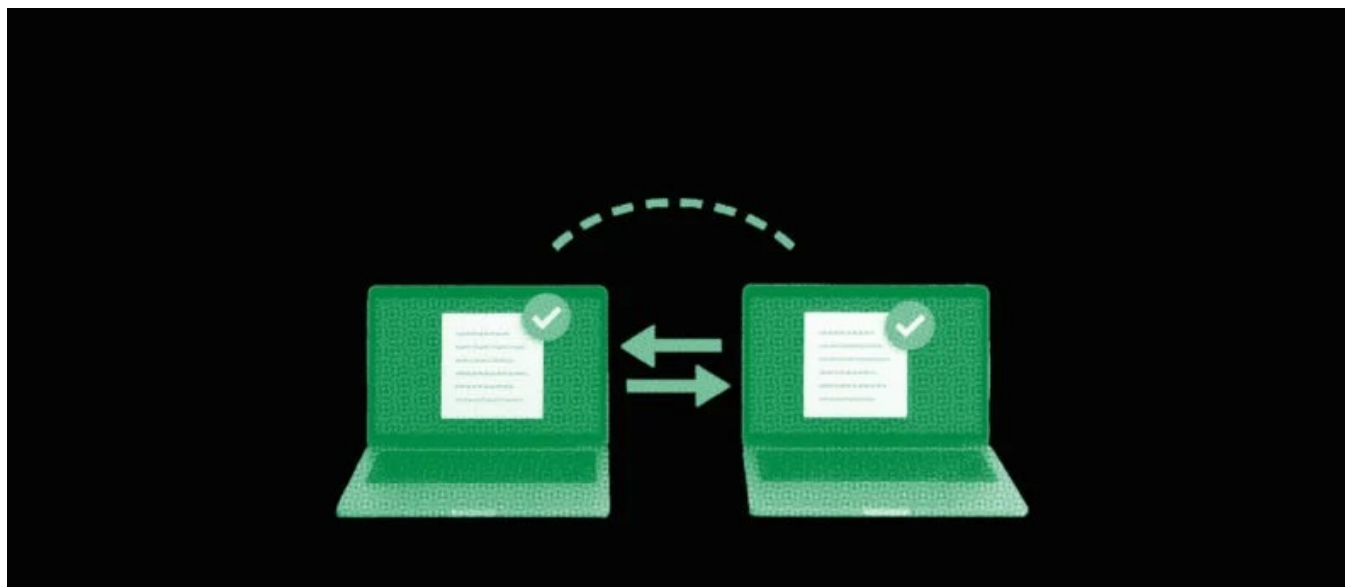
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QUICK SUMMARY

A failed ERP migration can wreak havoc on financial reporting, data integrity, and operational continuity—risks no CFO can afford. My expert guide breaks down the common pitfalls with ERP migration and outlines proven strategies to ensure a smooth transition.

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What Is ERP Migration? • The Characters in ERP Migration • When ERP Migration is Necessary • 6 Steps for a Successful ERP Migration • Timeline and Costs • ERP Migration Checklist • Common Challenges • Best Practices



KEY TAKEAWAYS

1. ERP migration is the process of transitioning from one system to another. ERP conversion is when you upgrade your existing ERP to a new version or patch.
2. Migrating from one ERP to another is tricky business. For a smooth migration process (and to make sure all your data stays in place), outline your requirements in well in advance, identify all available data, create contingency plans, and conduct a thorough system analysis.
3. Keep a running checklist of everything you need to do while you complete the migration process. This will help you avoid common pitfalls, such as data quality issues, low user adoption, and inadequate testing.

At the start of my career, there was one lesson I learned quickly: data integrity is everything. And with the wrong ERP migration process, it can compromise audits, misinform decision-making, and erode trust in your financial reports.

Migrating from one [ERP system](#) to another is a complex and delicate process, especially from a financial leadership perspective. One small misstep can turn into a series of costly disruptions, pulling your focus away from strategic planning and toward operational triage.

As a digital software expert, I know how easily (and quickly) ERP migration can go wrong. I've also witnessed how a well-planned migration can expedite your business—and your profits. That's why I wrote this guide: to help CFOs like you navigate ERP migration with foresight, control, and confidence.

So whether you're upgrading from an old ERP or adopting one for the first time, you're in the right place. Let's get into it.

What Is ERP Migration?

ERP migration means moving your business data, systems, and workflows from one ERP system to another. It also covers merging tools or shifting processes from external systems into a new ERP.

Migrating to an ERP typically involves:

- Extracting data from your old system
- Transforming the data to fit the format and structure of the new ERP
- Loading the data into the new ERP software

And despite how it sounds, ERP migration goes beyond transferring data. It also requires reconfiguring workflows, retraining users, and integrating with other tools. You may even need to rethink how departments collaborate.

ERP Migration vs ERP Conversion

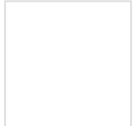
While they may sound relatively similar, ERP migration and ERP conversion are two different concepts that shouldn't be used interchangeably. **ERP migration** is the general term for any transition to a new ERP. This could be moving from a legacy solution, combining several tools into one, or changing to a new vendor.

On the other hand, **ERP conversion** is the process of upgrading your ERP system to a new version or patch (i.e. SAP ECC to S/4 HANA). Here's a short breakdown to help you determine if you need to migrate or convert your ERP:

	ERP Migration	ERP Conversion
Scope	Moving to an entirely new system	Upgrading within the same system
Purpose	To improve efficiency, adopt new technology, or scale with business growth	To take advantage of new features, offerings, or improvements
Timeframe	Up to 1-2 years	Approx 3-12 months

Data Integration	More extensive data conversion and migration	Minimal data conversion and migration
Costs	Higher due to higher scope	Lower due to smaller scope

Featured Tools



LiveFlow

4.9 ★



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Vena

4.5 ★

The Characters in ERP Migration

Just like with any other software change, ERP migration is not a solo effort—several stakeholders must collaborate for it to work. Some of these players include:

When migrating your ERP system, make sure to include everyone from CFOs and executives, to IT teams, project managements, and end users.

- **CFOs and Finance Leaders:** Oversee costs, ensure financial compliance, and [support ERP reporting](#).
- **IT Teams:** Handle ERP implementation and system configuration. They're also responsible for data mapping, extraction, transformation, loading, and testing.
- **ERP Vendors or Consultants:** Provide software know-how and user support. More often than not, they also lead migration efforts.
- [ERP Project Managers](#): Coordinate communication, define timelines, and track progress.
- **Department Leads or Managers:** Represent each team's unique needs and validate data. They also support testing and training initiatives.
- **End Users:** Help test workflows and provide usability feedback.

Together, each of these stakeholders help ensure that the ERP migration process is completed accurately and efficiently, while adhering to business goals and requirements.

AUTHOR'S TIP

Software migration is a big change for any organization—similar to how implementation is. Keeping open lines of communication, not only with key stakeholders but also affected team members, throughout the process will help you catch and fix errors or blockers before they occur.

When ERP Migration is Necessary (or Inevitable)

Sometimes, ERP migration becomes inevitable. At the executive and technical levels, you might consider swapping systems when you need to:

- Replace outdated, obsolete, redundant, or legacy systems (ERP or not)
- Consolidate siloed systems
- Improve data accuracy and eliminate inaccuracies or redundancies across teams
- Scale business operations in a way existing systems can't
- Move to a more compliant setup
- Access better reporting features

Software isn't meant to be static—it should grow and evolve as your business does. When it becomes complacent, it's often time for a change. Here are a few instances I've noted where ERP migration might be necessary:

Scenario	Why ERP Migration is Necessary
Existing systems (ERP or not) are outdated, obsolete, redundant, or legacy	Older systems often lack support, pose security risks, and can't meet modern business needs.

Teams use different tools, and their data is siloed	Disconnected tools slow collaboration, create confusion, and lead to double work.
Business data is inaccurate, inconsistent, or redundant across teams	Poor data quality causes bad decisions and wastes time on manual cleanups.
Current systems can't scale with business growth	As a business grows, limited systems slow things down. Cracks start to show, and teams rely on clumsy workarounds to keep things moving.
Compliance or audit requirements have changed	Outdated systems may not meet new regulatory standards, putting you at risk of non-compliance or failed audits.
There's a need for better reporting and insights	Performance tracking and strategic planning are harder without advanced reporting tools.

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6 Steps for a Successful ERP Migration

Moving your operations to a modern ERP system isn't an easy task. From approvals to planning and testing, it's a dedicated process that requires a lot of steps. To help you ensure minimal disruptions and get the most out of your ERP migration, I created this 6-step guide.

If you're looking for the TDLR version, [skip to the interactive checklist](#).

1. Outline Your Requirements

Every [successful ERP migration](#) begins with business needs. Are you seeking better supply chain visibility and real-time analytics? Or is your focus on improved customer relationship management (CRM) and regulatory compliance?

Before beginning, make sure you clearly define your ERP migration requirements. Start by interviewing department heads to understand their existing data, processes, and pain points. The more context you have, the better, especially if you're not directly involved in their day-to-day operations.

From there, take note of industry-specific regulations that your ERP must align with. Do you need better reporting features, stronger security, or support for global operations?

AUTHOR'S TIP

When defining ERP migration requirements, involve IT as soon as possible. This will help you to set realistic expectations and avoid costly surprises down the line.

Once you know your business needs, you can then document the datasets you'll be migrating, where they currently live, and your plan to clean them. During this step, also make sure to outline system speed, uptime, and reporting goals to track performance effectively.

Lastly, don't forget to list all the tools your ERP needs to integrate with (e.g., CRMs or payroll software). Forgetting a crucial piece of software can be more costly than you think!

2. Choose Your Vendor

Your ERP provider can make or mar the data migration process, so don't take this step lightly. [Choose the right ERP vendor](#) with these 10 key selection criteria:

Criteria	What To Look For
Business Needs and Functionality	Ensure the ERP fixes the issues that triggered the migration. Does it include all the functions you need to successfully run and grow your business?
Budget and Resources	Know and plan for the full migration cost, from the system to the people running it.
Internal Support	Get the backing of company execs and employees to limit resistance post-implementation.
Software Integration	Check that the system will integrate easily with your current tools.
Cost Efficiency	Weigh the total cost of ownership (TCO) against potential ROI to ensure your ERP pays off long-term.
Reputation and Support	Look for a vendor with a proven track record and strong migration support, during and after.
	Find out how long migration will take

Implementation Time and Complexity	and how complex it'll be. Cloud ERPs or hybrid systems are more modern and flexible than their on-premise alternatives.
Onboarding	Choose a vendor that offers in-depth training resources and ongoing support to ease your team's transition.
Customization, Maintenance, and Security	Confirm that the ERP is easy to customize and secure enough to protect your business data.
Scalability	Go for an ERP solution that can grow with your business without breaking or slowing down.

Before making your final decision, check out case studies and speak directly with past clients. It's also a plus if the vendor provides a sandbox environment to test core features risk-free.

If you're unsure of where to start your search, consider checking out our list of the [best ERP software alternatives](#):

1. [Kantata](#) — Best for full lifecycle, people-centric resourcing
2. [SAP Business One](#) — Best for small and midsize business management
3. [Acumatica](#) — Best for cloud-based ERP with real-time insights
4. [Workday](#) — Best for finance and HR management with continuous recalibration
5. [Epicor](#) — Best for industry-specific ERP solutions

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3. Build Your Strategy

Now it's time to strategize. A strong ERP migration project plan outlines exactly how you'll move from your current system to the new one. It limits risk, aligns stakeholders, and improves your chances of success.

Start by defining the scope, budget, and timeline of your migration. Then, break your data migration strategy into the following phases:

Following these four phases can help guide your ERP migration and ensure a successful switch.

This strategy may change as your ERP migration process progresses and you communicate with more stakeholders and team members. Consider using [project](#)

management tools to help increase collaboration and visibility as strategies or need requirements change so everyone can remain up to date.

4. Loop In Your Team

Truly transformative ERP migrations depend on team members. People need to know what's happening and feel like you consider them during decision-making.

Some questions you may need to answer include:

- When does the migration begin?
- How and when will training start?
- Who should report issues during testing?
- What's the go-live date?
- Will I lose access to past reports?
- Will this change how we send and get approvals?

Address these questions and others by creating an organized communication plan. Next, identify who needs what kind of training and set up feedback channels. This way, you can keep everyone up to date, train them effectively, and flag any issues before going live.

5. Execute the ERP Migration

The ERP migration execution is where you turn your project plan into action, from kickoff to testing and go-live. It involves the following steps:

The start of the execution phase is also the learning phase. During this time, your team is learning how to use the new ERP system, while you're learning all the errors that may still appear.

6. Manage Your ERP (And Your Team)

Go-live doesn't mean go home. Post-migration and implementation, you must monitor the ERP's performance, collect feedback, and provide ongoing user support.

To get the most out of your migration, make sure you complete the following:

- **Manage Reporting:** Set up reporting dashboards to track system uptime, error logs, and speed.
- **Encourage Questions:** Host office hours with open Q&A sessions where users can flag issues and get help.
- **Open Feedback Loops:** Create a dedicated feedback email or form for users to log bugs and friction points.
- **Write Everything Down:** Note all comments and feedback in a central document to track user sentiment and plan system tweaks.
- **Continuously Train:** Run refresher or follow-up training sessions to clarify common confusions and cover edge cases.
- **Review Regularly:** Review data flows, backups, and integrations regularly to maintain system health.

ERP Migration: Timeline and Costs

ERP migration timelines and costs can vary depending on your current setup, team expertise, data integrity, and the new system's complexity.

The average SMB or startup can expect their ERP migration to take 3-9 months. But for larger enterprises, these processes are generally 12+ months.

? WHY DO LARGE ENTERPRISE MIGRATIONS TAKE LONGER?

Most large-scale ERP migrations take longer due to their data volume, tiered user permissions, and more integration dependencies. Additional factors may include company approvals and waiting times for information gathering.

In terms of costs, ERP migration for SMBs can cost anywhere from \$10,000 to \$150,000. For larger businesses and corporations, costs start at around \$200,000 and can go well beyond \$1 million.

Keep in mind that these cost estimates include upfront ERP licensing fees and integration expenses. They also cover data migration tools, human capital, training, documentation, and ongoing support.

However, there are several other factors that can impact ERP migration costs, including:

- Data volume and complexity
- Legacy system limitations
- Number of users
- Customization needs
- Integration scope

ERP Migration Checklist

ERP migration can be a challenging process, and if not done correctly, can disrupt your entire business. That's why I put together this interactive checklist to help you make sure you got everything you need to kick off a successful migration.

Featured Tools



LiveFlow

4.9 ★



Float Financial



Vena

4.5 ★

Common ERP Migration Challenges

Nothing in life is simple and straightforward. Problems are bound to happen, regardless of how thorough you are with your planning. Here are three of the biggest ERP migration challenges you might face, and how to solve them.

1. Data Quality Issues

Issues like outdated records and inconsistent formatting can cause downstream errors in the new ERP. And until it's time to migrate, you may underestimate how messy your business's historical data *really* is.

Say your vendor master list contains different spellings or old addresses for the same supplier. These inconsistencies end up as duplicate entries in your ERP database.

SOLUTION:

Make sure to clean and standardize your master data pre-migration. Merge duplicates, update obsolete records, and use uniform formatting across fields.

2. Inadequate Testing

Rushing through or skipping testing means you can't verify if the new ERP works as planned. Post-rollout, you may find that invoices don't sync well in your [finance ERP](#) because of incorrect field mapping. You could also discover duplicate employee records due to mismatched ID fields.

SOLUTION:

A simple test beforehand can catch such issues earlier .Unsure what type of tests to do? Check out the [different types of ERP tests and when to use them](#).

3. Low User Adoption

No matter how *perfect* an ERP system is, it will fail if employees don't use it. And change resistance happens for many reasons, from inadequate training to clunky software and poor migration communication. For example, sales teams may keep using spreadsheets for deal management if they didn't get proper onboarding.

SOLUTION:

Drive user adoption and retention with proper training, intuitive user interfaces, and a structured communication plan.

Best Practices for ERP Migration

ERP migration best practices are a dime a dozen, but these are my 9 top tips to help ease the process:

- **Start Testing Early:** This way, you can find and fix issues quickly.
- **Continuously Test During Migration:** Validate data and system functionality at each migration phase, not just at the end.
- **Automate Data Cleaning:** Simplify and speed up [data cleaning](#) with Python, statistical analysis software, or vendor-provided tools.
- **Assign a Dedicated Migration Team:** Define who's responsible for data

governance, workflows, and testing so everything runs smoothly.

- **Document Your Field Mappings:** Don't rely on memory. Keep a detailed record of every old-to-new data field transformation.
- **Communicate Consistently With Users:** Send regular updates, invite feedback, and explain how the migration affects daily operations.
- **Run Pilot Programs:** For example, let a single department try out the new ERP before full rollout.
- **Track and Resolve Post-launch Bugs Fast:** Set up triage channels to collect, prioritize, and fix issues quickly.
- **Create a Rollback Strategy:** Prepare a contingency plan in case you need to pause or reverse go-live for any reason.

ERP Migration: The Pulse of Every Implementation

A smooth ERP migration sets the tone for everything that follows, from user adoption to long-term ROI. Beyond transferring data, it's about moving your business forward with intention.

So audit your current systems, involve your team, and prioritize clean data. Also, test like your business depends on it—because it does.

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