

Tick what is already true for your business. There are no right or wrong answers — the gaps show you where to prepare, and what to talk through in a discovery call.

1 Goals & pain points

- ☐ We can name the top three problems we want Odoo to solve.
- ☐ We know what "better" looks like (for example fewer manual steps or faster invoicing).
- ☐ Leadership agrees on why we are doing this and has named an executive sponsor.
- ☐ We know which teams will benefit most, and which will be affected most.
- ☐ We have a list of what must work on day one versus what can wait.

2 Processes

- ☐ Our main flows are written down, such as quote to cash and purchase to pay.
- ☐ We know where work is still manual, repeated or re-typed.
- ☐ We have listed our common exceptions (special pricing, partial deliveries, returns).
- ☐ We know which of our processes are genuinely unique and which are just habit.
- ☐ Someone can explain how each process works today, end to end.

3 Data

- ☐ We have one list each of customers, suppliers and products (not several versions).
- ☐ Duplicates and obvious errors have been tidied.
- ☐ We can export our data from current systems or spreadsheets.
- ☐ Opening balances, stock levels and open orders are available and reliable.
- ☐ Each type of data has a named owner who can answer questions.

4 People

- ☐ One person on our side owns the project and has time to do it.
- ☐ Key users from each team have been identified.
- ☐ Training time is protected in people's calendars.
- ☐ The team knows what is changing and why.
- ☐ We have agreed who makes decisions when processes or priorities conflict.

5 Systems & integrations

- ☐ We have listed the tools we use today (store, accounting, payments, shipping, CRM, email).
- ☐ We know which tools must connect to Odoo and which can be replaced.
- ☐ We know whether we need custom features or whether standard Odoo may be enough.
- ☐ We have a view on hosting (Odoo Online, Odoo.sh or On-Premise) or are ready to discuss it.
- ☐ We know who looks after IT, access and security.

6 Plan

- ☐ We have chosen a focused first phase (the few apps that matter most).
- ☐ We know what we will leave for later phases.
- ☐ We have an approach to budget and have confirmed who approves it.
- ☐ We know how we will measure success after go-live.
- ☐ We are ready to start with a discovery conversation.

Your score

0–10 ticked: Start with a discovery conversation. Most of the groundwork is still ahead, and that is a perfectly good place to begin.

11–20 ticked: A solid base. Tidy the gaps (often data and ownership), then choose a focused first phase.

21–30 ticked: You are well prepared. A focused first phase such as an Odoo Quick Start is a sensible next step.