

GARBAGE IN, GARBAGE LIVE

A field guide to preparing your data before an ERP implementation

“We are cancelling the implementation.”

- A CFO, NEW TO A COMPANY STRUGGLING WITH A LONG IMPLEMENTATION

Bad data is the single largest factor in whether an ERP project lands on time. It doesn't announce itself; it just quietly stalls configuration, blows up your Gantt chart, and burns out the team that has to clean it up mid-project instead of before it. There are three kinds of data that trip up even well-prepared manufacturers. Here's what to do about each one, starting six months before kickoff.

MILE 1 • TRAILHEAD

Historical Data

Decide now - don't drag it forward

MILE 2 • MIDPOINT

Static Data

Clean over months, not weeks

MILE 3 • SUMMIT PUSH

Dynamic Data

Maintained through go-live

01

You Don't Need the Old Maps Anymore

Your ERP vendor will send templates and say “populate these.” They aren't budgeted to clean your data and they don't know your business well enough to.

- › **Don't migrate historical transactions.** It's complicated, expensive, and nine times out of ten the ROI isn't there.
- › **Need one data point from history?** Ask your consultants to add it as a custom field, not a full migration.
- › **Keep a read-only copy of the legacy system** After a year in the new system, you'll barely reference it.
- › **This is not an IT project.** IT pulls data from its hiding places; a cross-functional team decides what's worth keeping.

02

Whose Boots Are These?

Static data lives in QuickBooks, HubSpot, Salesforce, and a dozen spreadsheets - and none of it has a single owner. Here's what needs a home before go-live.

Chart of Accounts

Usually the first thing loaded. Don't like your COA today? Redesign it now - new segmentation makes coding and analysis far easier.

Contacts

Update names, shipping methods, addresses, and banking info for every active customer and vendor relationship.

Parts / Items

Verify descriptions, costs, units of measure, make/buy status, and lead time for every active part.

Employee Master Data

Active employees only - needed for login creation, labor collection, and security group assignment.

Customers

Limit to active in the last 3 years. Deduplicate every ID. Standardize terms - pick one convention for terms

Vendors

Confirm accurate lead times at the SKU level. MRP is only as good as this number - budget time to analyze it.

BOMs

Update work centers, operations, and queue/run/setup times. Start collecting shop-floor labor now for planning KPIs later.

Warehouses

Define location types and bin/aisle structure. Count and clean inventory before kickoff - then again right before cutover.

You Can't Step in the Same River Twice

Status flags lie when nobody's kept them current. Stale "open" records bring their garbage straight into your new system and MRP believes every word.

- › **Open Purchase Orders** - sort oldest-to-newest or highest-dollar-first. Close what you won't receive against. Validate quantities, dates, and cost.
- › **Open Sales Orders** - close stale demand signals. Watch for obsolete part numbers and phantom forecast orders skewing MRP.
- › **Open Work Orders** - close what's invalid. Push new jobs past go-live where you can. Remaining WIP value carries onto your balance sheet.
- › **Open AR / AP** - migrates at the invoice level. Double-check cash application before customers get billed for invoices they've already paid.
- › **GL Opening Balances** - have substantiation ready for every line. An audit ahead of cutover forces a cleaner balance sheet.

Inventory Balances - the one that matters most

Wall-to-wall physical count at every site, close to go-live. Adjust actual quantities - don't just book a reserve for what you can't find. If you carry lot traceability, record and correct it too. No time to do it yourself? Hire a firm that specializes in physical counts. It's worth every penny.

START 6 MONTHS OUT

Static data can be cleaned up over time. Dynamic data integrity has to hold all the way through go-live. If you don't have time to clean your data before the project starts, you won't have time to do the project twice.

The river doesn't slow down just because you're not ready. Neither does your go-live date.

Trail Guide can help. We've walked this trail.

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