



ACCOUNTABILITY INSIGHTS

Post-Acquisition ERP Integration Checklist

A practical guide for private equity firms standardizing systems in the first 100 days

PREPARED BY ACCOUNTABILITY • ERP IMPLEMENTATION SPECIALISTS

How to Use This Checklist

The first 100 days following an acquisition are critical. This checklist helps private equity firms standardize systems, improve visibility, and accelerate value creation.

WHAT'S INSIDE

1**Discovery**

Understand the systems, processes, and data you inherited.

2**Standardization**

Build a common structure across accounts, reporting, and KPIs.

3**ERP Evaluation**

Decide on the platform that will carry the business forward.

4**Implementation**

Execute the plan and put the new system to work.

PHASE 1

Discovery

- ☐ Identify all financial systems currently in use
- ☐ Review reporting processes
- ☐ Document manual workflows
- ☐ Assess data quality
- ☐ Interview key finance and operations leaders from the acquired company

✓ **EXECUTIVE TIP**

The discovery phase sets the baseline for everything that follows. Resist the urge to rush it — decisions made without full visibility into the acquired company's systems tend to resurface as costly rework later.

PHASE 2

Standardization

- ☐ Establish chart of accounts structure
- ☐ Define reporting requirements
- ☐ Identify key performance indicators
- ☐ Create governance standards
- ☐ Align the target company's processes to portfolio-wide standards where possible

✓ **EXECUTIVE TIP**

Standardizing early makes every future add-on acquisition easier to fold in — treat this phase as building a repeatable playbook, not a one-off cleanup.

PHASE 3

ERP Evaluation

- ☐ Assess scalability requirements
- ☐ Review integration needs
- ☐ Identify compliance requirements
- ☐ Evaluate cloud vs. legacy systems
- ☐ Determine whether to migrate onto the parent company's existing ERP or select a new platform

✓ **EXECUTIVE TIP**

Before evaluating vendors, decide whether this is a migration onto an existing platform or a net-new selection - that single decision changes the entire timeline and budget.

PHASE 4

Implementation

- ☐ Establish project timeline
- ☐ Assign stakeholders
- ☐ Define training plan
- ☐ Create success metrics
- ☐ Build a data migration and cutover plan

✓ **EXECUTIVE TIP**

Implementation timelines during integration are often compressed by deal pressure - protect data migration and testing time even when other deadlines flex.

Common Pitfalls

Watch for these across every phase of post-acquisition integration.

1**Delaying standardization**

Every month of delay compounds inconsistent reporting across the portfolio.

2**Inconsistent reporting structures**

Makes it difficult to compare performance across the platform or roll up results for the board.

3**Underestimating data migration effort**

Poor migration is the single most common cause of post-go-live disruption.

4**Lack of executive sponsorship**

Without visible sponsorship, integration work loses priority against day-to-day operations.

Bonus Resource

Every acquisition brings its own mix of legacy systems, data quality issues, and timeline pressure. If you would like an outside perspective on where your integration stands, our team is glad to help.

Complimentary Offer

Schedule a Free 30-Minute ERP Strategy Session

We'll review your current ERP environment, discuss your business goals, and help you identify opportunities to streamline operations and maximize your ERP investment - whether you're evaluating a new system or optimizing your current one.

No obligation. Just practical advice from experienced ERP consultants with over 25 years of helping private equity-backed and growth-focused organizations improve operations, strengthen financial visibility, and maximize the return on their ERP investment.

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