

FREE CHECKLIST

The Odoo implementation checklist

From first preparation to go-live: 26 checkpoints across 7 phases, with the tools and deep-dives to match. Free to use, with or without us.

RADICAL FANATICS
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FOR	project leads and key users of an Odoo implementation
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SCOPE	26 checkpoints across 7 phases, with links to tools and deep-dives
STATUS	free to use and share - with or without us

How to use this checklist

Work through the phases in order. Every line is checkable; the most important ones link to a deep-dive or a tool on fanatics.nl. The checklist is deliberately not vendor-specific: it works for any serious Odoo implementation, whichever partner you work with.

PHASE 0

Preparation

- ☐ Appoint one internal project lead (SPOC) and make their availability explicit - it sets the pace more than any technical choice.
» **why this is the lever**
- ☐ Assign a key user per process who decides, tests and later supports colleagues.
» **what a key user does**
- ☐ Pick your go-live date and count back, including two months of buffer for testing and overrun.
» **run your date**
- ☐ Set a budget frame based on scope, not the other way round.
» **what it costs**

PHASE 1

Fit-gap & scope

- ☐ Map per process what actually happens, not what the manual says.
- ☐ Record per line: standard, configuration or custom. This becomes the scoping table that makes the project predictable.
» **the TARGET method**
- ☐ Name every integration separately and request the specifications now - third parties set their own pace.
- ☐ Assess data quality honestly: migrating clean data is a task, cleaning it first is a sub-project.
- ☐ Agree a definition of done per process before anything gets built.
- ☐ Decide what goes live in phase one and what deliberately comes later - scope is a dial.

PHASE 2

Configuration

- ☐ Set up the chart of accounts and reporting structure first - everything books back to it.
- ☐ Configure roles and permissions before the first user enters the system.
- ☐ Build the main flow working end to end: quote, order, delivery, invoice.
- ☐ Start integrations as early as possible and test them with real data.

PHASE 3

Data

- ☐ Clean the source data in the old system, not during the migration.
- ☐ Run a trial migration and have key users validate the outcome.
- ☐ Agree a date after which the old system is frozen.

PHASE 4

Testing & training

- ☐ Have key users test with real scenarios from their own practice, not demo data.
- ☐ Collect findings on one list and triage: blocking, before go-live, or after.
- ☐ Train end users on their own work, not on the whole system.

PHASE 5

Go-live

- ☐ Fix go/no-go criteria up front and agree who decides.
- ☐ Write a cutover runbook: what moves when, and what the fallback is.
- ☐ Plan hypercare: short lines and daily check-ins in the first weeks.

PHASE 6

After go-live

- ☐ Keep one wish list and schedule further development in a fixed rhythm.
- ☐ Evaluate with the key users after a month: what works, what grates.
- ☐ Close the project only once the buffer-period findings are resolved.

Tools that go with this checklist

- Go-live planner - runs your feasible date in a minute
- Implementation calculator - cost breakdown and planning per process
- The TARGET method - how we turn scope into a predictable project

Need more than a checklist?

Our book "How we do Odoo" describes the complete approach behind this checklist - honest, practical and free to download.

» **Download the book at fanatics.nl/book**

Radical Fanatics is an Odoo Gold Partner in Amsterdam. Honest about what works standard and what does not - including when the answer is that you do not need us.

» **Book a free scan at fanatics.nl/scan**