

Value Realisation Readiness Checklist

Local Government ERP Programs

Use this checklist before commencing a value realisation program to assess whether the preconditions for success are in place. Score yourself honestly — the value of this assessment comes from an accurate picture, not an aspirational one.

Rating: Yes = fully in place | Partial = in progress or partially in place | No = not yet in place

Strategic Foundations

#	Readiness Criterion	Yes	Notes
		Partial	
		No	
1	The ERP strategy and business case were authored internally — not outsourced to an external consultancy.		
2	The initial business case is deliberately high-level with aspirational benefits tied to the council's strategy — not a detailed spreadsheet of projected headcount savings.		
3	The 'do nothing' scenario has been formally assessed, and the ERP investment is justified on strategic grounds, not just aspirational savings.		
4	The board and executive understand that Year 1 ROI will be negative and have accepted the investment hump.		
5	The council has committed to an 'adopt, don't adapt' platform thinking principle. Customisation is explicitly constrained.		

Governance and Accountability

#	Readiness Criterion	Yes	Notes
		Partial	
		No	
1	Formal benefit owners have been designated from operational management for each major benefit area.		
2	A benefits register has been created and formally endorsed by the executive.		
3	The benefits register is a standing agenda item at every steering committee meeting.		
4	A program sponsor at the executive level has been identified and has committed to reviewing benefits progress quarterly.		
5	A formal executive onboarding process is in place for incoming leaders who join the program mid-flight.		

Resourcing



#	Readiness Criterion	Yes Partial No	Notes
1	A dedicated change and benefits coordinator role exists within the program (even if part-time).		
2	Change management resourcing is embedded in the program from inception, not planned as a pre-go-live activity.		
3	The PMO has the capacity to conduct 90-minute whiteboard sessions with operational managers before each ERP phase.		
4	Budget for independent quality assurance reviews at major milestones has been included in the business case.		
5	The Business Improvement or Continuous Improvement function is engaged and will take ownership of benefits tracking post-program.		

Value Realisation Measurement Readiness

#	Readiness Criterion	Yes Partial No	Notes
1	Baseline data has been (or will be) collected for key process metrics before each ERP phase deploys.		
2	The measurement approach for each benefit has been confirmed, including who collects the data and how frequently.		
3	Hard benefits (Financial, Operational) and soft benefits (Customer, Risk, Capability) are both represented in the register.		
4	The team understands that 'good enough' baselining is acceptable. Perfect data is not required to start tracking.		
5	A schedule has been set for quarterly CDT check-ins that will continue after program close, as a BAU activity.		

Change Management Integration

#	Readiness Criterion	Yes Partial No	Notes
1	The change management program for each ERP phase is designed around specific benefit targets rather than the software release schedule.		



2	Disbenefits have been explicitly explored and documented alongside benefits in the register.		
3	Training programs are targeted at the specific process changes required to achieve committed benefit targets.		
4	The council has a plan for how benefits tracking will continue when the expert project team disbands.		
5	Community communication at each maturity level has been planned. Ratepayers and elected members will be informed of measurable outcomes, not just system milestones.		

Scoring

Score	Interpretation	Recommended Action
20-25 Yes	Ready to proceed	Commence the benefits mapping whiteboard sessions for the first ERP phase.
14-19 Yes	Mostly ready — address gaps before proceeding	Identify the 'No items' in the Governance and Resourcing sections as priority fixes. These are the most common failure points.
8-13 Yes	Significant gaps — do not proceed without addressing	The program is at risk of becoming a technology project without a benefits program. Escalate governance and resourcing gaps to the program sponsor before the first go-live.
Below 8 Yes	Foundations not in place	The council is at Level 1 on the maturity model. Focus on the Strategic Foundations and Governance sections first. Do not attempt to run benefits sessions until benefit owners are designated and the register is endorsed.

