REQUIREMENTS TEMPLATE · WORKING DOCUMENT

ERP requirements template — the version worth handing to your SI.

A printable intake worksheet for capturing requirements before a system integrator scopes your build. Fill it out first — a vendor's own questionnaire will always be shaped to fit their product.

PREPARED BY **ORPINGTON ADVISORY** SECTIONS **6**

01 Programme Basics

Company / entity name

Target go-live date

Current system(s) being replaced

Named executive sponsor

Number of entities / locations in scope

Approximate user count

02 Business Objectives

RANK YOUR TOP THREE

1

2

3

03 Functional Requirements by Module

MODULE	MUST-HAVE CAPABILITY	NICE-TO-HAVE CAPABILITY
e.g. Finance & GL	*Multi-entity consolidation*	*Automated intercompany elimination*

Continue module rows on a second sheet if needed. **Must-have** means the programme does not go live without it — everything else is a nice-to-have, and every nice-to-have you mark as must-have raises your build cost and your risk of missing the date.

04 Technical & Compliance Requirements

Required integrations (list all)

Data volume / transaction volume expectations

Regulatory / compliance requirements (jurisdictions, industry rules)

05 Non-Negotiables

WALK-AWAY CONDITIONS

1
2
3

06 Internal Sign-Off

ALL THREE REQUIRED

EXECUTIVE SPONSOR — SIGNATURE & DATE

FINANCE LEAD — SIGNATURE & DATE

IT LEAD — SIGNATURE & DATE

Three signatures, not one. If finance and IT haven't both signed the requirements, the scope you hand your integrator is one person's understanding of the business — and every gap discovered later is billable.

Requirements captured. Scope the build with confidence.

Sign-off here is the input. The Confidence Score, later, checks whether what actually got built matches what was signed off.

GET YOUR SCORE
orpingtontech.com/free-diagnostic