

STRATEGIC ODOO INTEGRATION GUIDE

by



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1. INTRODUCTION & STRATEGIC OVERVIEW

WHY THIS GUIDE MATTERS

Digital transformation is more than just implementing software - it's about evolving your business operations to meet modern challenges. This guide provides our proven approach to implementing Odoo, combining technical expertise with strategic business transformation.

KEY SUCCESS FACTORS

STRATEGY-FIRST APPROACH

Focus on business objectives before technical implementation

PROVEN METHODOLOGY

Based on successful implementations across industries

RISK MITIGATION

Clear framework for managing change and ensuring adoption

VALUE-DRIVEN TIMELINE

Structured approach to maximize ROI

UNDERSTANDING IMPLEMENTATION TYPES

QUICK START IMPLEMENTATION

Ideal for	Small to medium businesses needing rapid deployment
Focus	Core functionality deployment
Timeline	4-8 weeks
Key benefit	Immediate value realization
Perfect for	Companies wanting to start with essential modules and expand later

MULTI-PHASE APPROACH

Organizations requiring strategic, systematic change	Ideal for
Staged module implementation aligned with business priorities	Focus
Customized per phase	Timeline
Controlled transformation with minimal disruption	Key benefit
Complex operations or when change management is critical	Perfect for

BIG BANG IMPLEMENTATION

Ideal for:	Organizations requiring complete system overhaul
Focus:	Full-scale transformation across all departments
Timeline:	2-4 months
Key benefit:	Comprehensive, synchronized change
Perfect for:	Companies with tight deadlines or strict system cutoff dates

IMPLEMENTATION SELECTION CRITERIA

- ✓ Business Complexity
- ✓ Timeline Requirements
- ✓ Change Management Needs
- ✓ Resource Availability
- ✓ Risk Tolerance



2. STRATEGIC PLANNING & ASSESSMENT

INITIAL BUSINESS ANALYSIS

Understanding your current operations is crucial for a successful implementation. Our assessment focuses on:

PROCESS MAPPING

- Current workflows and pain points
- System interactions and dependencies
- Manual processes and automation opportunities
- Data flow across departments

TECHNOLOGY LANDSCAPE

- Existing systems inventory
- Integration requirements
- Data migration needs
- Technical constraints and opportunities

STAKEHOLDER ANALYSIS

- Key decision makers
- Department leaders
- End-user groups
- Change management considerations

RISK ASSESSMENT & MITIGATION

COMMON IMPLEMENTATION RISKS

DATA QUALITY ISSUES

- Historical data accuracy
- Master data consistency
- Migration complexity

PROCESS DISRUPTION

- Critical business functions
- Peak season considerations
- System cutover planning

USER ADOPTION

- Training requirements
- Resistance to change
- Process adjustments

MITIGATION STRATEGIES

- Phased data migration approach
- Parallel system running when necessary
- Comprehensive testing protocols
- Early user involvement and training
- Clear communication plans

RESOURCE PLANNING

INTERNAL TEAM REQUIREMENTS

Project sponsor (executive level)
Project manager/Single Point of Contact
Key users from each department
IT support staff

TIME COMMITMENT GUIDELINES

Project sponsor:	2-4 hours/week
Project manager:	15-20 hours/week
Key users:	5-10 hours/week during relevant phases
End users:	Training and testing as scheduled



3. TECHNICAL IMPLEMENTATION FRAMEWORK

SYSTEM ARCHITECTURE PLANNING

INFRASTRUCTURE DECISIONS

- Cloud vs On-premise evaluation
- Environment setup requirements
- Performance optimization considerations
- Security architecture design

INTEGRATION ARCHITECTURE

- API and interface planning
- Third-party system connections
- Real-time vs batch processing needs
- Data synchronization strategies

DATA MANAGEMENT STRATEGY

DATA MIGRATION APPROACH

- Master data prioritization
- Historical data requirements
- Data cleaning protocols
- Validation procedures

CRITICAL DATA ELEMENTS

HISTORICAL DATA

Archived transactions
Historical records
Legacy documents

MASTER DATA

Chart of Accounts
Product catalog
Customer/Vendor database
Price lists

TRANSACTIONAL DATA

Open orders
Active projects
Current inventory
Outstanding invoices

MODULE IMPLEMENTATION SEQUENCE

CORE FOUNDATION

BASE CONFIGURATION

- Company settings
- User access rights
- General preferences
- Workflow rules

ESSENTIAL MODULES

- Accounting foundations
- Basic inventory setup
- Sales framework
- Purchase structure

ADVANCED FEATURES

- Custom field additions
- Workflow automations
- Report customizations
- Dashboard configurations

QUALITY ASSURANCE FRAMEWORK

TESTING PROTOCOLS

UNIT TESTING

- Individual module functionality
- Custom development validation
- Integration points verification

PROCESS TESTING

- End-to-end workflow validation
- Cross-module interactions
- Business scenario testing

USER ACCEPTANCE TESTING

- Key user validation
- Process confirmation
- Performance verification



4. POST- IMPLEMENTATION & CONTINUOUS EVOLUTION

TRANSITION TO LIVE OPERATIONS

FIRST 30 DAYS SUPPORT

- Daily system health monitoring
- Quick response protocols for critical issues
- User behavior tracking and support
- Performance optimization adjustments

STABILIZATION PERIOD

- Weekly progress reviews
- Issue prioritization framework
- Knowledge transfer sessions
- Process refinement opportunities

SUCCESS PACK FRAMEWORK

	25-HOUR SUCCESS PACK	50-HOUR SUCCESS PACK
Scope:	\$3,300	\$6,000
Validity:	12 months	12 months
Usage:	Specific optimizations and improvements	Ongoing improvements and support
Ideal for:	Targeted enhancements and periodic support	Complex environments and continuous optimization

CONTINUOUS IMPROVEMENT CYCLE

SYSTEM OPTIMIZATION

- Performance monitoring
- Usage pattern analysis
- Process efficiency reviews
- Feature utilization assessment

BUSINESS EVOLUTION SUPPORT

- New feature implementation
- Process refinement
- User capability enhancement
- System scalability planning

SUPPORT STRUCTURE

SUPPORT CHANNELS

- Professional ticketing system
- Priority-based resolution
- Clear escalation paths
- Knowledge base access

SUCCESS MEASUREMENT

KEY PERFORMANCE INDICATORS

- System performance metrics
- User adoption rates
- Process efficiency gains
- Business impact assessment

CONTINUOUS FEEDBACK LOOP

- Regular user surveys
- Process improvement suggestions
- Feature enhancement requests
- ROI validation



5. APPENDICES & RESOURCES

USEFUL TEMPLATES

Project Charter Template
Requirements Gathering Worksheet
Testing Scenarios Template
User Training Plan

IMPLEMENTATION CHECKLISTS

Pre-Implementation Readiness
Go-Live Preparation
Post-Implementation Review

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