



ERM

A Simple Guide to Modernizing Your EHS System

The questions,
considerations, and tools
you need at each phase
for a successful upgrade

Sustainability is our business











Welcome to your EHS System Guide

Whether you're modernizing legacy systems or building new capabilities, use these checklists, prompts, and planning tools to clarify your vision and align your team.

This guide is fully interactive. You can check off items and type directly into the text boxes as you work. If easier, you can also print it out and use it as a reference document.

Roadmap Phases

Click the arrows to jump to the relevant section.

 <p>Business Orientation, Initiative Planning, Technology Alignment</p> 	 <p>Project Initiation Solution Design</p> 	 <p>Configuration & Solution Implementation</p> 	 <p>Support & Sustainment</p> 
PLANNING	INITIATE DESIGN	BUILD TEST DEPLOY	SUSTAIN



Planning

Set the north star. Where are we going—and why? This phase aligns business goals with a technology strategy.

Checklist

Define the Problem: What are we solving for?

Craft the Tech Vision: What does long-term success look like?

Assess Current State: How do people, process, and tech currently align?

Identify the Players: Who will be impacted, who needs to be engaged, and who should our champions be?



Timeline Drivers

Stakeholder and process alignment, number and/or age of legacy tools, data readiness, business case and cost clarity



Cost Drivers

Technology roadmap availability, solution architecture complexity, number of stakeholders to engage and unite

Reflection Questions

What business goals are driving this transformation?

Which legacy processes or systems are most urgent to address?

What are the main pain points?



Pro Tip

The first roadblock often appears before the journey begins. Who holds the power to say yes and who can quietly stall progress? Build a quick influence map that identifies champions (who accelerate adoption) and skeptics (who expose blind spots). Engage both early —because surprises later cost more than conversations now.

Influence Map

Stakeholder Name	Role	Influence Level	Engagement Plan
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Initiate

Start smart. Go beyond software selection. Consider how each tech decision shapes your overall solution ecosystem. Map your landscape, set the architecture, and ensure it all fits the bigger picture.

Checklist

Architecture Boundaries: What's fixed, and what's flexible?

Kickoff & Governance: Set the tone for how you'll operate—communication, risk handling, decision documentation.

Design

Design with depth. It's more than the systems—think data lakes, integrations, and user experience. Keep what works and redesign what doesn't. This is the blueprint to your future state.

Checklist

Requirement Alignment: Are we solving the right problems?

Architecture Flow: Does the tech connect from source systems through to reporting?

Know Your Data: Types, access, sensitivity, have a strategy for your historical data.

User Permissions: How will different teams across the organization access and interact with the system?



Timeline Drivers

Defined success criteria, governance and communication structures, SME availability, project scope, design complexity



Cost Drivers

Lack of standardization, decision speed, cultural readiness for change

Reflective Questions

What does your ideal future state look like?

What are the biggest risks if you don't act now?

How will you measure success at each stage?

Pro Tip

Map Today, Design for Tomorrow. Start with what matters most: establish the essential requirements to prevent scope creep and budget overruns. With your tech landscape mapped, assess business and data readiness. Then look ahead—will your choices integrate and scale?





Build

Build the new reality. Here's where the action starts. Implement the solution by upgrading or transforming what exists today—and make sure it all works together: software, data, reporting, and business integration tools.

Checklist

Follow the Blueprint: Are you building according to the approved design?

Data Integrity: Ensure master and historical data are usable.

System Integration: Connect source systems to the new solution.

Reporting Tools: Build dashboards and reports for easy data access & analysis

Governance Docs: Capture decisions for long-term sustainability.

Test

Test for impact. Now's the time to make sure it all works. Does the solution deliver what was expected? Check that it meets your requirements and plays seamlessly across your tech landscape.

Checklist

Testing Scope: Are we covering all critical areas?

Success Criteria: What does 'good' look like?

Stakeholder Involvement: Who needs to test?

Deploy

Deploy with confidence. This stage unites your people and processes with tech. Aid smooth adoption with training, support, and real-time adjustments.

Checklist

Deployment Strategy: Full launch or phased rollout?

Go-Live Communication: Let users know it's live.

Training & Support: Make help accessible and clear.



Timeline Drivers

Degree of change from initial design, team readiness for testing and ability to complete it, site readiness, organizational agility



Cost Drivers

Magnitude of digital shift, 'first time right' (prototype ahead of full deployment), scale/scope of testing required, training schedule and type (train the trainer vs. consultant led), internal vs. external IT support

Reflection Questions

What dependencies could impact your timeline?

How will you ensure data integrity and system integration?

What training or support will your team need?

PRO TIP

Test like it's live—because it soon will be. Simulate real-world scenarios to validate that the solution delivers on its promise. In times of change, more communication is better than less. Does every stakeholder know what's changing, what's coming, and how their experience will evolve? Highlight the benefits to drive engagement and readiness.

Training Needs

Team/Role	System Benefits	Training Needs	Delivery Method
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Sustain

Sustain the Momentum. Keep the system thriving with office hours, health checks, and feedback loops. Plan for hand-off and future optimization.

Checklist

Implementation to Support: Is the hand-off ready?

Change Management: How will updates and new integrations be communicated for continuous adaption?

Governance Setup: Have roles been defined and KPI's set for ongoing monitoring?

Next Steps: What's next on the transformation roadmap?



Timeline Drivers

Timing of go-live to the next reporting milestone, speed to decommission prior system, support team readiness.



Cost Drivers

End user participation throughout implementation, post implementation enhancements

Reflective Questions

How will you monitor system health and communicate updates?

What feedback mechanisms will you put in place?

What's your plan for continuous improvement?

PRO TIP

Fuel adoption and trust. Post-deployment, use quick wins to build momentum and reinforce confidence across the organization.

Timeline & Cost Table

Phases	What may drive costs	What may increase the time frame	Potential mitigation measures
Business Orientation, Initiative Planning, Technology Alignment			
Planning			
Project Initiation, Solution Design			
Initiate			
Design			
Configuration & Solution Implementation			
Build			
Test			
Deploy			
Support & Sustainment			
Sustain			

Next steps & support

We hope you found this guide useful.

Let us know if you would like a guided walkthrough or want to discuss your answers and next steps.

We're ready to partner with you at any stage of your transformation.

Contact us to schedule a conversation or to learn more about how ERM can support your digital goals.

[CONTACT US](#)

Why ERM?

50+

Years of
experience

500+

Generation
assets
supported

8000+

Professionals

150+

Offices

40

Countries &
territories

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