

Pre-Planning Checklist for Moving from Omni Price to RPM

Prepare for a Smooth Transition

To ensure a successful transition from Omni Price to Rockton Pricing Management (RPM), we recommend reviewing and completing the following items before your project officially kicks off. Preparing now helps us implement faster, avoid delays, and build the right pricing strategy from the start.

1. Understand Your Current Pricing Setup

- ☐ Review how pricing is currently structured in Omni Price.
- ☐ Identify any custom pricing scenarios or exceptions you rely on.
- ☐ Note any limitations you've encountered in Omni Price. If you could wave a magic wand, what else would you like to accomplish with your pricing?

2. Clarify Your Pricing Goals

- ☐ Determine if you're planning to expand pricing needs (e.g., rebates, tiered discounts, contract pricing).

3. Review Your Current Pricing

- ☐ Review your current pricing data and note any upcoming changes you're planning or considering (e.g., naming conventions, data additions).
- ☐ If you're considering moving ERPs, note which ERP system(s) you're evaluating. Are you aware of the shortcomings in pricing in the new ERP?

4. Evaluate Internal Resources

- ☐ Confirm you can provide access to sample data or reports during the Discovery phase.
- ☐ Determine who will serve as the internal project lead.
- ☐ Identify team members involved in pricing, IT, and finance who need to be part of the project.
- ☐ Confirm decision-makers and approval process for pricing changes. We often find RPM inspires business process improvement that involves the entire team.

5. Timing and Resources

- ☐ Review and understand your team's bandwidth and availability during the implementation period.
- ☐ Share any time-sensitive pricing needs or deadlines, or overlapping projects that might impact the timeline

6. Prepare for RPM's Capabilities

- ☐ Browse the RPM product page to familiarize yourself with key features.
- ☐ Make note of any features or modules you're most interested in exploring.
- ☐ Identify any integrations you'd like to leverage.