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Selecting the Right Software Implementation Partner

5 Steps to a Successful Implementation



Choosing the Right Software Implementation Partner:

5 Important Steps to a Successful Software Implementation

Over the last 8 years we heard numerous examples of software implementations that were not on schedule and suffered continuous cost overruns. For some companies this results in hundreds of thousands of additional dollars that were never considered in the Return on Investment (ROI) or software selection process.

The members of your implementation team including the technical and business leads are crucial to success or failure of your implementation. Unfortunately, the importance of these resources is not always considered during the selection process and in most cases is an afterthought. The right implementation partner can not only get you up and running smoothly, realize your return on investment quicker, and ensure your business goals and objectives are part of your plan.

We have identified several factors that have contributed to a successful software implementation. By reviewing and following these steps as you go through your selection and implementation process, you will achieve a successful implementation and quicker ROI.

1 Commit as much due diligence in selecting your implementation partner as your software provider.

Especially if your implementation partner is your software provider. This unfortunately is usually an afterthought and is not questioned until after the agreement is finalized. Most customers purchasing the software do not interact with the actual implementation team until after the ink has dried. Ask the representative if the person giving the presentation on the software is part of the implementation team – odds are they are not and you will never see them again.

Below are several possible implementation options to be aware before you begin your selection and implantation project.

- **An independent implementation partner who is selected outside the software sales process.**

  Pros: There only business is software implementation so they are focused and are directly accountable. There implementation consultants will have a proven track record and in depth knowledge of the software and the business applications.

  Cons: They may have little or no influence with the software provider depending on their product development process.

- **An implementation partner who is an independent Value Added Reseller (VAR) of the software provider.**

  Pros: They are authorized to sell the software and will in most cases operate from a different price strategy. They also do not have the development and support overhead allowing for a price structure more in line with the company size in their territory.

  Cons: They typically will not have access to the software programming code and must rely on the provider for enhancements.

- **An implementation partner subcontracted by the software provider.**

  Pros: Have direct access to the software company's support and engineering departments. Are usually not presented as a contractor and represent the software provider. Typically provide dedicated resources for the project.

  Cons: They must adhere to the decisions of the software provider as they relate to the software and its functionality.

Each of the options above can result a in a successful implementation in the right situation. The ideal configuration depends on your business and corporate goals, and resources.

Regardless of whether you choice to use the software provider or a partner, the following should considered before starting your project:

- **Selecting the right software is easier than the right implementation partner.** Software is about features and functionality and the implementation is about change, processes, and trust.

- **Talk to reference customers**. Find customers that are similar in size and in the same industry. Ask for a list of customers and pick the ones you want to speak with. Most providers will tell you which customers they have selected to reference.

- **Meet the actual implementation team**. The success of the implementation project depends as much if not more on the implementation. Have a discussion with the team to understand their strategy, business objectives, and methodology. Look for standard project answers that do not address your specific business needs

2 Use your implementation partners to make sure your technology is aligned with your goals and processes.

Changing technology is a catalyst for some amount of process change whether it involves completely new processes or redesign of the current processes. Make sure your implementation partner has a balance of business and industry experience along with the in depth knowledge of the software functions. A good implementation partner will recommend best practice process changes that work with the technology. The technology should work with your business not the other way around. Your partner should be able to educate you on how to use the software for your business…not just how the software works.

- **Establish the implementation project goals and objectives.** How will these be reached using the software
- **What features and functions of the software will support these goals and objectives?** Understand if additional development is need out of the gate.
- **Review your current processes.** Do you have current processes that are broken or inefficient? Are there opportunities to improve the current processes easily?
- **Know your data.** Define the source points for the data needed for the software, then work with your implementation partner to fill in the missing pieces.

3 Define the scope of the project even if it appears to be a small implementation.

Too many companies don't spend enough time planning and scoping the implementation project in the beginning and find halfway through the project additional functionality is needed or cannot be used.

Build a good project foundation and you will reap many times over the time spent planning at the beginning of the implementation.

You may want to implement the software by functionality or module so results are achieved as the project progresses. Your implementation partner should be able to help you design the project timeline so functionality can implemented that provides a positive ROI during the project.

- **Get the right support.** To get a good start enlist executive support from both sides.
- **If you prefer a phased approach, scope all phases in the beginning.** Your partner should recommend the phase sequence that will provide the smoothest transition.
- **Be prepared to spend more and take longer**. Starting and stopping during the implementation takes additional time to re-engage resources regardless of the cause. If the project stalls because of a software modification or enhancement more time will be needed to startup.

4 Trust your implementation partner.

The best partners have the experience, tools, and resources to manage every detail of the implementation. They have the benefit of many implementations and will keep you and themselves on task and on schedule. Hopefully, you will do this only once, so need to be able to trust them.

A good partner will have lessons learned from other companies and industries that can provide a different perspective or solution a critical business issue or objective. Leverage this information it can a valuable intangible benefit to the business

- **Get the right support.** To get a good start enlist executive support from both sides.

- **Fight scope creep.** Determine what changes are top priority and if they will impact the business or ROI.

- **Realistic timelines.** Insist your partner provide you with realistic time lines for the tasks. Timelines designed to meet an end date typically result in additional delays.

5 You've completed a successful implementation.

Congratulations! Now you need to start putting a continuous improvement plan into place. Don't become complacent with the software and design your future business around the software. Review the modules or functions you did not use and determine if an enhancement or modification will be beneficial for the future. Enhancements and new functionality requests that become part of the base program are not normally billable.

Become part of your manufacturer's development process. Engage with their product manager, board or council to include your input into the future of the software.

Create a business lead or group to help with user questions and ongoing training. If you used an implementation team provided by the manufacturer they will most likely have moved on to the next project or implementation and a new person with the support group will be introduced. If you used a third party or partner, use them to help with developing the functional requirement documentation. They can use the terms easily understood by the manufacturer and will have a relationship with groups involved in the design and decision making.

- **Budget from ongoing maintenance and education.** Most businesses do not devote sufficient time and expenses to maintenance and education. These are the two areas that can provide the most ROI.

- **Upgrades.** Agree on an upgrade plan that is approved by all departments. Many companies think upgrades are a waste of time and money, the fact is most upgrades are included in the annual support fees. It is much harder to review and test multiple versions and you may be delaying fixes that are needed.

- **Everything changes including business.** As your business needs change reach out to your partner to determine is changes or adjustments can be made to the system to accommodate the change. Many mature software applications include system options to allow for certain changes without additional program development



PO Box 526

Milford, DE 19963

Tel: (888) 282-1001

www.Anseris.com

Sales@Anseris.com