

# STEP-BY-STEP APPROACH TO A SUCCESSFUL SOFTWARE IMPLEMENTATION

Here's how to avoid the common mistakes contractors make.

By Steve Antill

*It took months of painstaking research. You came up with a budget and a realistic list of must-have features. After narrowing down your search to a few products, you spent the time to see a demonstration of each one, check client references, and investigate the long-term prospects of the developing company. Finally ... the best-fit construction software package has been purchased and installed.*

In the minds of many contractors, this is where the story ends, and the business thrives “happily ever after.” In the real world, however, that’s not how it works. Without a thoughtful, step-by-step approach to software implementation, contractors risk replacing one set of headaches with another.

To use a system successfully, it takes more than just a few hours—or even a few days—of initial training. To guarantee that the software investment pays off, it takes the three steps discussed in this article.

## STEP 1: IMPLEMENTATION PLANNING

This step occurs immediately after the software’s purchase. During this phase, the contractor should discuss the following things with the software trainer:

- The company’s specific needs
- Expectations for the software
- Requirements that are unique to the business
- Individual users’ responsibilities
- How much time can be set aside each week to train and work on the new software

The planning phase is extremely important because it can save a lot of wasted time and money down the road. When switching from one accounting system to another, for example, the trainer may provide advice on the best methods for converting historical accounting data or how to easily integrate payroll and other field data into the system. With a focus on the flow of information, the processes that are in place, and the people who will be using the software, it is the software trainer’s job to make sure that the system will run as efficiently as possible and meet the company’s needs.

## STEP 2: TRAINING

Once the implementation plan has been developed, the next step is to have the company’s employees learn the software and set it up for them to use it. During the initial training session, users will learn to navigate the software, perform day-to-day activities, and understand the work flow within the system.

On many systems, training includes setting up reports that will be needed, as well as customizing default settings and user-defined fields. This is where lots of companies make critical mistakes. By not having enough key people involved in the setup and structure, contractors risk setting themselves up for improper data collection and inaccurate reporting down the line. When implementing a new job-cost accounting system, for example, the project manager, estimator, and owner, as well as the accounting staff, should all be included in the system’s setup. Aside from the cost code structure, the field and accounting staff must agree on the types of reports that are needed, and how the information will be entered and coded.

Generally, software training sessions include tutorials and homework assignments that help prepare both the user and the system for day-to-day use. Some software will even help contractors set up a practice company—using their actual data—so that employees can practice and perform the actual tasks they will be conducting on a daily basis. This allows users to test data flow, run reports, and troubleshoot any problems before actually going live.

The last phase of initial training is going live and using the software. As employees begin to use the software, they should have fast and easy access to “live” support. This phase of training can last a few weeks or several months.

## STEP 3: WRAP UP AND FOLLOW UP

This step goes back over everything the client and the software vendor agreed upon in Step 1. After reviewing the initial training phase, which generally runs about 10 to 12 weeks, contractors must decide the following things:

- They are satisfied with the training.
- The system has met their expectations.

Now is the time to go over the implementation plan with the software vendor, point by point, to see if every need was addressed.

At this point, the contractor should feel good about the system, confident in the investment, and able to use the software on a day-to-day level to run the business. By no means, after just a few months of initial training, should users expect to be “done” learning the software, however. Ongoing education and training—especially with systems that offer extensive construction-specific features and functionality—are really a given.

By following this three-step process, which includes preplanning and postevaluation in addition to training, it is possible to greatly increase a company’s chance for long-term success. ♦

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