



# SOFTWARE IMPLEMENTATION MADE SIMPLE

Setting realistic expectations can make your project smooth and trouble-free

*BY FRED ODE*

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After six months of intense arguing, pleading and cajoling with your boss, that new software package you've been after for your department is now yours. Couldn't live without it, you stated. Will increase productivity tenfold, you declared. Need it if we want to grow, you lamented. Thrilled by your win, you engage in an exaggerated endzone-style victory dance.

***POOF! Back to reality. The honeymoon is over, as it becomes increasingly apparent you are responsible for implementing this pricey software program.***

Tasks on your list include, but are not limited to, installation, set-up, customization, data import and end-user training. You also need to learn and become an expert in the software. And you promised your boss that the system would be live within two months after purchase. What can you do to simplify the process? Try following these straightforward tips:

## BE REALISTIC

Rome wasn't built in a day, and neither will your new software system be up and running in a 24 hour period. Ask your vendor for advice on how long their typical implementation takes, from initial install to running it. Also ask if they have had experience with installations of similar nature to

yours, chances are they can provide you with guidelines for devising a reasonable implementation timetable.

## CLEAN UP AHEAD OF TIME

Let's face it, all systems could benefit from regular spring cleaning. Hours used to clean your system before converting to the new program is time well spent.

## ANALYZE METHODOLOGIES

Implementation is a great time to analyze how you've done things in the past and see if those processes and methodologies should be updated moving forward. For example, a client of ours had determined that a better system for processing and tracking change orders could increase its profitability. Like many contractors, it often completed change order work before receiving approvals.

When it purchased our accounting program, it took the time to evaluate its processes and make improvements using the new system features available to it. Now its estimators' time and workloads are managed better, management stays aware of the full life-cycle for each change order, and each document is generated quickly and consistently.

## AN IMPLEMENTATION GAME PLAN

*A checklist of important tasks to remember*

- Set target date for system purchase
- Name implementation project team and assign areas of responsibility
- Produce implementation timeline
- Review hardware and software requirements of server/users prior to software installation; clean old system
- Analyze current usage processes and methodologies
- Create improved usage processes and methodologies (if needed)
- Install new system
- Train administrator(s)
- Create and test system customizations
- Convert test batch of data; test, test, test
- Train end-users on system and new processes/methodologies
- Assign helpers to assist end-users during the first week of live usage (most likely administrator(s))
- Import all data
- Go live, running parallel for at least one week

## DEVELOP A GAME PLAN

Chances are you and/or your team spent time compiling a pre-purchase plan. Now it is time to compile a different plan—the game plan to get your new software working. Determine what changes to hardware and network configurations will need to occur before or during installation. Think about all of the data that need to be imported or entered into your new system. How will you provide that information to the people who need to enter it? When will you train those employees on the new system?

Take your best guess at the amount of time each task will take—and then double it. Most people grossly underestimate the time needed for each task.

## BREAK IT INTO PHASES

Some users find it helpful to break their project into smaller, more manageable phases of implementation. A personal experience with this is the implementation of our own CRM program. Our phase one consisted of making certain that everything from the old system was available in the new system. Once extensive testing and end-user training were completed, we proceeded to import our data (all 150,000 records!) and went live. We then moved onto phase two, which included the implementation of many new features and processes—the main reasons we had purchased the system for in the first place. The moral? Don't feel everything needs to be completed 100% in order to go live

## TRAIN YOUR USERS

System training is a cornerstone of your project; it can basically make it or break it. The idea of using a new system can be frightening to users. Reassure your employees by keeping them involved in the process. Ask them how they used the old system. Meet with them to explain ideas on new processes. Provide a thorough, hands-on training class. If you are breaking your project into phases, be certain to set up multiple training sessions. And most importantly, assign a point person that users can feel comfortable going to with their questions, especially during that first week

## CONSIDER OUTSIDE ASSISTANCE

This is especially important to consider if your company has limited resources to commit towards implementation. Almost all software vendors offer services and/or products to help. Some of these

services, like training, may be included within the final software sale price. And keep in mind that you can pick and choose from the services you need, a la carte style. For a modest fee, your vendor will most likely be able to complete what is needed in a fraction of the time it would take you.

## ANTICIPATE PROBLEMS

It is the rare system implementation that doesn't have a few minor glitches. To avoid being caught off guard, simply think through various worst-case scenarios for each step of the project. Anticipating problems before they happen will help you to formulate alternate plans.

The implementation of a new system should be an exciting time for your business, a time to evaluate, improve and grow. Using the simple steps above will hopefully make your experience a pleasant one.



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Foundation Software is the developer of FOUNDATION® – America's #1 Construction Accounting Software. Since 1985, we've been dedicated to giving contractors the back office tools they need to manage their job cost accounting, project management, and scheduling.

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