

# Implementing New Business Management Software: 7 Ways To Make It Smooth and Seamless

by Robert M. Callanan



As a small business or a business just getting started, you might be using an entry level accounting system where the investment in training and configuration is minimal because the product is fairly easy to use. Often these systems are ideal until your business begins adding more users and your business processes become more complex than what the system can support.

When a small business decides to implement a new accounting or business management system, it cannot shut its doors or stop day-to-day responsibilities to install, configure, and test a new system. Also, it cannot expect to start using a new system without investing time to consider potential improvements to existing business processes or train end users and migrate historical data.

This is where the role of your solution provider or consultant is critical. Top solution providers efficiently transition you from your old system to your new system with minimal downtime for your staff. In addition, your solution provider will continue supporting the solution for you as your business grows and evolves.

When choosing a new system, your choice of a solution provider should carry as much weight as the product itself. Here are a few things to look for when choosing a solution provider:

## **1. Understands Your Business and System Needs**

A software provider should understand your business and business processes to interject which processes can be more efficient. The provider should listen to you, give good examples of how the system should work, and ask good questions, not just about software, but also how your people work, who they are, their skill sets, and how they would use the application.

## **2. Exhibits Exceptional Knowledge About Their Product(s)**

It is a must for your software provider to thoroughly understand the functionalities, capabilities and intricacies of their solutions and coherently explain those to your end users so you optimize your investment and use the business management system to its fullest potential for your organization.

## **3. Knowledge of Other Products and Solutions**

A good solution provider makes sure you understand what you are looking for and know ahead of time what the expected returns and benefits will be. If you do not know what *you* need to do well versus what a business management system does well, you can get trapped into buying a system because of something it does that is not important to you. System selection prepares the client for the sales cycle, gets their information together, and allows them to quickly eliminate inappropriate systems.

#### **4. Proven Approach to Implementing**

Entry level accounting systems can often be implemented by following the software vendor's checklist. However, mid-level systems require more planning and testing because there are many different configuration options to make it adaptable to your business processes. The top solution providers have developed and can explain to you their approach to implementing the system. The approach should include options for functional design, pilot testing, data migration planning, a cut-over strategy and ongoing support.

#### **5. Communication**

When evaluating systems, many businesses are first introduced to a salesperson and may not have the opportunity to assess the communication skills of the consultants who will eventually be assigned to the project. A top solution provider will have an approach for communicating with the client regarding project status and budgets. Also, your solution provider is often preparing deliverables to you, including procedures documentation, end user training guides and more – a top solution provider can provide sample documents that demonstrate their ability to communicate in these areas.

#### **6. System Cut-Over**

When your company starts using the new business management system, your comfort level must be established by the solution provider. That can take anywhere from 30 days to six months, depending upon the client and how significant the changes are in IT and business processes. During this time, your solution provider should still pay attention to you, check in to make sure things are working the way they were expected, and provide any additional support and training your end users need.

#### **7. Ongoing Support**

Many businesses begin realizing a positive return on their investment in a new system within the first 12 to 18 months. The project and your relationship with your solution provider should not end there. As your business grows and evolves, you want some assurance that your solution provider is always looking after your business – recommending improvements to business processes, assessing new modules or tools and their impact on your business, or offering user groups where you can interact and share ideas with other end users. The top solution providers make these and other services available to you for as long as you own the system.

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