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by Easy Projects

PRACTICAL GUIDE

to Painless Business Software Implementations

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Introduction

At Birdview PSA, we've been regularly implementing automation software for many years across various departments. Throughout our journey in the world of SaaS, we've been fortunate enough to meet many talented people in the project management space who have successfully executed hundreds of such implementations and have helped us do the same.

This whitepaper is by Maxim Yakubovitch - a project management business consultant and business coach with 20 years of experience. He's been in the game for a while and we like to say he's an expert on software implementations. Rest assured, we know white papers about software implementation can be horribly boring and we've done our best to make this one easily digestible for you.

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Software Implementations don’t have to be scary

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Implementing software is one of the biggest challenges growing companies and organizations face today. As the business landscape continues to evolve, it is becoming increasingly reliant on technology for efficiency in data mining, marketing, sales, operations, customer relations etc.

There is a tool for everyone. **To stay competitive, organizations are having to adapt to new technologies quickly. The good news is it's relatively easy to do for smaller organizations and start-ups which are more flexible and open to change.** However, for larger organizations, this can be slightly problematic. This arena is where implementations specialists are often brought on board to make some magic happen.

In this whitepaper, we'll go over how to effectively implement business software in the most effective and impactful way possible. Let's go.

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A Tale of Two Strategies

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There are two business process automation software implementation strategies that are particularly popular:

“Hard” implementation

The objective of this method is to implement as much of the functionality as quickly as possible to get the necessary reports and information. This is a very guerilla-style of implementation and has its various pro’s and con’s. If you use this strategy, beware of the following consequences:

- General user complaints about having to use this new software;
- It will take longer to train everyone as everything is being implemented at once;
- There will be more help requests from users, and if you don’t have the right support, their frustration will increase;
- Extraneous planning is required.

“Soft” implementation

- The whole implementation process will take quite a while (from several months to a couple of years);
- Users will complain less as they’ll gradually get accustomed to the software;
- Not all the reports can be extracted from the software unless all the necessary features are being used.

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Fear and Loathing of New Technology

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In our experience, new software implementation causes resistance. Here’s why: Many employees don’t want to use new technology because they think it’ll reveal they don’t work enough. Because of this they hang on, tooth and nail, to their old habits and collectively band together to boycott the new system. This can be especially true of larger organizations in which implementing change is much harder to do.

In cases like this, **leadership plays a key role.** Company leaders need a strategy on how to convince everyone to adopt changes. One of the most effective things to do, is implement a strict policy that makes it mandatory.

At least two things need to be done in order to begin the implementation:

- First, **introduce and announce to the department, team or company the new tool** and give them examples of how it will help them perform better. It’s a good idea to bring in specialists to conduct demos and answer questions - they sold to you, so they should be able to sell your team as well.
- Second, **organize user support.** As they begin to use the new tool, realize that there will be a learning curve and they’ll need all the help they can get to avoid frustration and abandonment. With assistance from the implementation specialists, put together helpful online guides which include videos and instructional documents. Organize live sessions and webinars to sort out issues that people are running across.

Choosing a Strategy

Choosing a Strategy

Now it’s time to discuss which approach to choose. The most important thing is to analyze the implementation project constraints. Ask yourself the following questions:

- The whole implementation process will take quite a while (from several months to a couple of years);
- Users will complain less as they’ll gradually get accustomed to the software;
- Not all the reports can be extracted from the software unless all the necessary features are being used.

Let’s have a look at each constraint separately.

If you’re not confident that the scenarios of usage match your business processes, then it’s preferable to choose the ‘soft’ implementation. But, if you’re implementing an out of the box solution, which is usually thoroughly tested and the scenarios function according to your preference, you can take a risk and go for the ‘hard’ way implementation.

If management requires the system to be up and running in a few months, then it’s sensible to aim for the ‘hard’ implementation.

For a successful ‘hard’ implementation of, for example, a records management automation software, a full-time support specialist is required for every 50 users. If your company can’t afford a sufficient number of support specialists, then it’s better to choose the step-by-step implementation.

In some cases the ‘soft’ implementation is impossible, because it’s necessary to simultaneously start using all the core features, otherwise project objectives won’t be met. The main challenge is to define the basic set of key features and focus on its launch. If this set is defined properly, we can use the ‘hard’ way implementation of those specific features. But if requirements are not clearly defined, there’s a risk that this method won’t come out as a success.

The best way to solve the problem of resistance is through clear, consistent communication. You can give speeches, or post a series of educational articles on the company’s internal portal. The posts should include some hard data that shows what is really driving the motivation to implement new technology.

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Best Practices

Best Practices

We would now like to tell you about some of the approaches I've used to successfully implement software products.

Define User Expectations

In order to choose the tools appropriate for the implementation, it's important to define the user expectations first: if the majority of them are against the implementation, those responsible for the implementation will have to persuade them that the software actually has value. If the majority of users are anticipating the implementation and believe the product will help them with their challenges, then it's great luck. In reality, I've mostly come across the first scenario.

Persuading the Users

To understand user reluctance, you have to understand their reasons for not wanting to use the software. There are two groups of reasons fear and unawareness of the importance of working with the software. The fears are usually bound to the following:

- Fear of being fired
- Need to use two different software products simultaneously
- High possibility of increased transparency
- Fear that the new software will turn out to be too complicated
- Decrease of employee's power and value after the implementation

Let's talk about these fears:

Fear of being fired

If management actually plans cutbacks, it's a serious challenge to tell the truth to the employees because it will cause resistance.

Simultaneously, management wants to keep those employees until the software implementation is finalized. So there's a contradiction: **implementing the software will let us reduce the number of employees, but we don't want to lose them too early, that's why we don't reveal the info to them.**

I can see two obvious ways out:

- **Transparency:** Management gives out its intention to cut back on some people after the implementation is over, but offers good compensation and some help with future employment. Besides, those employees get such experience from working with the new software that can be useful in other organizations. For some employees this honesty can become the reason to stay and try to earn their position back.
- **The management is aware that increased productivity can be a way to generate more sales or products** with the same number of employees. If that doesn't contradict the strategy, it's a good idea to inform the employees and relieve their apprehensions.

Fear of the need to use both software products simultaneously

We think this situation can exhaust employees. We would restrict this period to one month, and only introduce it in 'pilot' departments. For example, **if the software is planned to be used in multiple departments in different branch offices, then parallel work can only take place in one office**. This very office will show if the data is correct in the reports the new software provides and will provide a chance to correct any mistakes that occur and successfully implement it in all the other offices afterwards.

The employees who take on additional work can be paid more for the period, which will eliminate resistance. In some of the cases it's very unlikely the software has any bugs that can cause the system to fail or decrease the performance dramatically.

Then using two systems simultaneously may be a bad idea, and it’s better to just start using the new system at some point.

The fear that the employee’s’ work will become more transparent

Explain that transparency is one of the goals the company’s trying to achieve, or it’s just a demand that has to be fulfilled. If there are employees that are not ready for increased transparency, they will either leave the company or will go on resisting the implementation.

In some of the cases it’s very unlikely the software has any bugs that can cause the system to fail or decrease the performance dramatically. Then using two systems simultaneously may be a bad idea, and it’s better to just start using the new system at some point.

Fear of a steep learning curve

Get over this hurdle by simply providing:

- Extensive user training
- Examples from similar projects (where those fears never came true)

The fear of losing importance and power

This fear can be battled by explaining that the value the employee brings is not in the knowledge itself, but in the augmentation and distribution of that knowledge, which is particularly important for the company.transparency, they will either leave the company or will go on resisting the implementation.

Takeaways

Takeaways

- Implementing business automation software is quite a challenge. It requires analyzing a whole range of constraints and choosing a suitable implementation strategy;
- **Managing the implementation should become a project of its own**, with a separate Customer and Project Manager
- **Today software implementation is more of an art than science.** That's why it's important for the implementation team to consist of the specialists who are the masters of this art and have enough experience
- **Setting clear goals before the implementation project.** Those aims should incline towards increasing employee productivity - which will result in cutbacks or an increase in sales, etc. Declaring project objectives and explaining the value they bring to the employees
- **Preparing oral presentations and a series of articles in the company's internal portal** showing how process errors caused trust issues or loss of money, or how the processes and the work routine will change after the implementation
- **Using "pilot" departments for parallel work in two different software products** or, in case of low probability of software failure - just giving up the old system and transition the new one

- **Explaining it to the employees how increased transparency is one of the company goals**. Even if it's not, then it's a demand that has to be fulfilled.
- **Introducing user training** that has to be thoroughly planned and well-executed
- **Using examples from similar projects** where the users were afraid not to get a grip of the software (and then they just laughed at their fears.)
- Explaining it to the employees that **their value is in the augmentation and distribution of their knowledge**

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