SUPERCHARGING SOFTWARE A WORKBOOK SERIES FOR TECHNOLOGY LEADERS

The Implementation Process

FAYE

WORKBOOK SERIES

Getting the most from your technology is more than checking boxes off a list. It's about getting a real understanding about what you need. It's not just about what the software can do; it's about what it can do for you.

There are different points throughout the software process where companies get stuck. Software is not a one-size-fits-all solution, so to get the most from your software, you need to take a deep dive into your use case. So, how do you do that?

At Faye, we eat software. We eat the complexity and are shooting out a series of questions for you to answer to truly unlock your software's full potential.

This Supercharging Software Workbook Series walks you through the questions you need to answer at each stage of software: selection, implementation, integration, adoption, and optimization.

It's a roadmap for you to break through some of the sticking points most common during the software process. You may only need one of these workbooks, or maybe all five. Regardless, don't get tied down, cut through the complexity.

Let's kick this process off with Step 2: Implementation.

IMPLEMENTATION PROCESS

Whether you're upgrading from a homegrown system or switching from one software provider to another, knowing exactly how to migrate your data and implement new processes can be a challenge.

So, you've made the first step into the implementation process and found the very best software solution for your needs. Now what?

You know it's time to implement, but that can feel daunting and overwhelming before it even begins. The good news is: it doesn't have to be!

Answering the below questions before and throughout the implementation process will ease the process and create efficiencies along the way.

PHASE 1:

Questions to answer before you start the implementation process:

1. What are your goals/measurable objectives for your software? Think about your short (30 days), medium (3-6 months), and long (6 months).

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2. How are you measuring ROI? You are implementing new software for a reason. Don't lose sight of that and work through how you are measuring ROI of your system.

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3. What is the framework of what you want your new system to do? Now that you have the goals, how will you achieve them? Try creating a roadmap.

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4. How are you preparing for implementation? Do you have a designated implementation team? Does it represent all voices (a cross-section of the varying needs for your software)?

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5. Do you need any customizations? Think about what's unique to your business/industry that you wouldn't find out of the box.

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6. Do you need integrations?
Email, Calendar/Meetings, Marketing Automation, Accounting, TMS, CRM, Business Intelligence, Communication, Project Management, ERP, Virtual Assistants, etc.

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7. Do you have technical support for your integrations? Who is that support?
This will be different for homegrown platforms vs. out-of-the-box large name software.

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8. What does the training schedule look like? Not just initially, but ongoing.
What training has worked well historically for your company?

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9. Where is your data currently? Software, filing cabinets, etc.

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10. How easy is it to extract your data?
Is it a chore or quick extraction process?

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11. What absolutely needs to go into the new system? Take the time to clean it up and ensure there is not any bogus data.

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12. Do you have a vision for your project?
    What is your business case? The more specific your plan the better.

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PHASE 2:

During the Implementation Process:

1. Do you need multiple phases for your project? Phases can match the short/medium/long term goals you set prior to implementing?

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2. What customized modules and/or fields do you need?
    What information do you need your system to track?

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3. Do you need new security measures?
    For instance, do you need to host on your own servers?

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4. Have you double-checked you didn't miss anything?
Create a must-haves checklist.

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5. How are you protecting from scope creep?
Do you have any safeguards if things get derailed?

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6. Have you extracted everything you need?
Any data you've left behind that is necessary?

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7. Do you know how to migrate your data?
Attachments, emails, history records

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8. Do you have a software champion?
How is that person being supported?

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9. How much time do your resources actually have?
How often are they meeting and working on this project?

10. How is the C-Suite being updated about the project?
How are you reporting ROI to C-Suite throughout the different phases?

11. Are your integrations properly connected and working as you need them?
User test and make sure your data is flowing from one system to the next.

12. How are you ensuring the set up works best for your end users? Test checklist, test scripts, etc.

13. Who are your beta users? Consider bringing in different voices from different departments/
different functions.

FAYE

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At Faye, we love software. We eat it, breathe it, and build it. Our mission is to make the best software in the world even better by helping clients lead the way with software strategy, deployments, integrations and technical support.

With us is better than without us. As an Inc. 5000 award winner seven years in a row, we help mid-market and enterprise clients globally achieve up to10x productivity returns by leveraging the hidden potential within Zendesk, SugarCRM, Salesforce, HubSpot, and more.

There is no ceiling to what we can achieve with a lot of caffeine and an uncompromising commitment to make software better. We are intensely passionate about eating your software complexity and challenges, so that you don't have to.

Our flagship offering, AXIA by Faye™ bundles our IP, capabilities and pre-built software enhancements into one monthly or annual subscription. The result-A partnership that drives lasting value and optimization even as you grow.

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