

## Secrets of a Successful New Software Implementation

*The phrase 'it isn't rocket science' is commonly used for many, seemingly simple, tasks. But somehow, these can still fill many of us with dread.*

Introducing new processes, or software, into a business has the potential to send many people's blood pressure sky-rocketing. However, with some simple planning, effective support AND the right tool for the job in hand, implementation doesn't have to be a nightmare.

- 1 Simplify** – Know what you want (and actually NEED) from your software.  
CIS is a must have for construction accounting but you may also need to think about:
  - How will you manage applications and retentions?
  - Job costings and cost codes – how many will you need?
  - What payroll and pension auto-enrolment requirements do you have?
- 2 Time** – Be realistic about how long implementation will take.  
Give yourself enough time to learn before you need to rely on the new system. A month\* is a realistic starting point but will depend on your team and your requirements. Know your deadlines!
- 3 Plan** – What do the users need to be able to do with the software and what do they need to achieve?  
Plan your implementation process and decide your user roles. Ensure your plan includes:
  - Time for:
    - Installation
    - Training
    - Practice scenarios (if using)
    - Final roll-out

Think about the user roles you'll need, plan who needs what access and the associated training e.g.

- Accounts Administrator – Data entry, bank reconciliation, VAT returns
- Accounts Manager – Nominal reports, P&L, purchase and sales orders
- Contract Manager – Job reports and purchase orders
- Payroll Clerk – Payroll, pensions

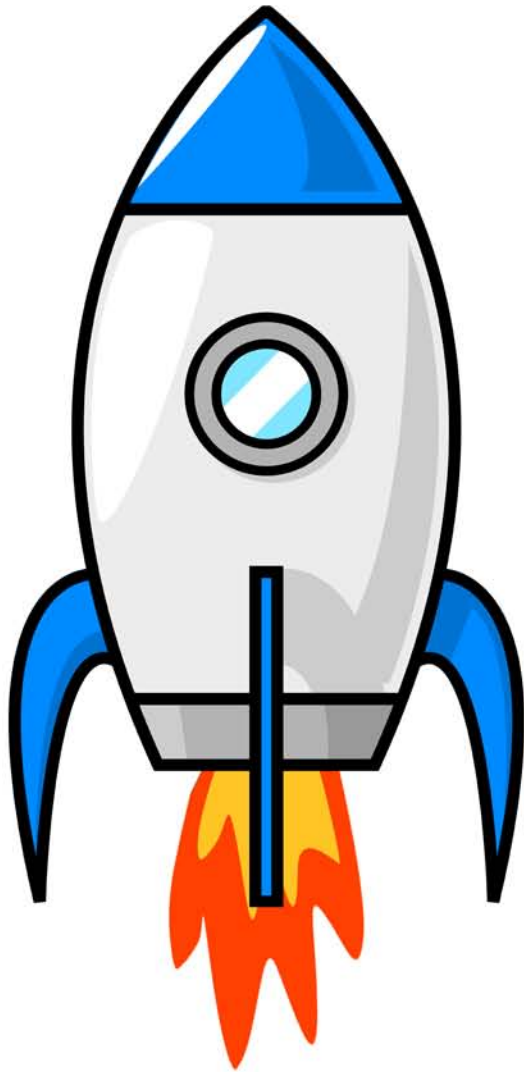
What are your goals from using the software, how will you know if you've achieved this?

- 4 Communicate** – Work with your supplier so there are no disappointments or surprises.  
Be honest about what you need to achieve and any quirks or issues you may be concerned about.  
Make use of all the training and support available. If you don't know something, ask – they are there to help you.
- 5 Confidence** – Follow these steps for a successful, less stressful software launch.  
You know what you need, you've picked the right product, followed the plan, allowed time for training and asking questions and everyone knows their role – now sit back, relax and enjoy an implementation well done.

*\*based on construction accounting software implementation; other software and enterprise solutions may take more or less time – ask your supplier.*

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### Software implementation launch plan



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