

How to Select & Implement Software

Evaluating & implementing a mission critical business application can be a challenging and time-consuming task. Here is a process that will help you choose and implement the right solution for your business.

Recommended Software Selection Steps:

- 1 – Define your requirements
- 2 – Identify costs
- 3 – Technical & architectural issues
- 4 – Implementation, data conversion & training
- 5 – Test Drive the software
- 6 – Support, documentation and enhancements
- 7 – When & how to implement

Step 1 – Define your requirements

Identifying, defining and prioritizing functional requirements are probably the most difficult tasks. In completing these tasks, be sure that all participants understand the reasons for looking for a new system. Are there functional deficiencies that will no longer support the business? Is the existing system too old and is failing to keep up with evolving technology?

Discuss functional requirements within the following areas: operations & office staff, business owner(s), customers, instructors, accounting and other schools/gyms/studios.

Topics to include:

- What do you like about our current software that you do not want to lose?
- What are some features you wish our current software had?
- How do you see our needs changing in the future?
- What capabilities have you heard from other schools/gyms/studios that are useful?
- What reports do you consider most important for us to retain?
- What are our customers asking for?
- What new reports would save time and enable us to make better decisions?
- Are our customer statements & class rolls acceptable?

Step 2 – Identify costs

- Upfront and ongoing costs should be carefully evaluated since pricing models vary among software vendors. Some vendors license their software by installed workstation, named user, server and/or concurrent user.
- Be sure to identify and verify the e-commerce process and associated costs, server hardware, additional software required/recommended, ongoing IT services and telecommunications costs.
- It is a good idea to document current price schedules from the vendor and verify this information with existing customers.

Step 3 - Technical & architectural issues

Identify the database used and confirm that it is an industry standard. This will ensure that data can be extracted if problems arise and that you data will be compatible with other industry standard software. If you are hosting your own server, verify that sensitive fields are encrypted (such as credit card numbers and bank account numbers). This encryption is important in the event that the server is stolen or hacked. If you are hosting your own server, make sure you have a firewall strategy in place. If you have multiple locations, get references with similar scenarios so you can verify that the architecture will work in your real world scenario.

Step 4 – Implementation, data conversion, training and support

Find out how the vendor supports you in your implementation effort. Make sure they have documentation and that it has an implementation section. Also, find out if there is a data migration service and any costs that may be associated with it. Discuss the best way to train your people and establish ways they can practice with the new system.

Step 5 – Test Drive the software

Make sure you take the time “test drive” the software so that you can experience the system first hand. This is very important to verify that it will work for your specific business needs. It can be challenging to verify all the functionality and so be sure to include visiting a customer site in your “test drive”.

Step 6 – Support, documentation and enhancements

In evaluating a vendor’s support services, including documentation and enhancement offerings, it is very important to talk to several existing customers. First, find out the vendor’s on-going support, service offerings and enhancement plan. Find out how they charge for all options and offerings and, once again, verify this information with existing customers. Find out how often the vendors enhance the software, how they charge for implementations and how they handle customers’ unique software enhancement requests.

Be sure to gain a clear understanding of total financial impact of the software, including upfront or initial costs, infrastructure costs, upgrade and enhancement costs, training costs, maintenance fees and technical support charges before you make your choice.

Implementing the New Solution

Step 1 – When to Implement

Software can be successfully implemented during anytime of the year with the proper planning and preparation. Some schools prefer to begin using new software in the Spring for their Summer and/or Fall registration. By beginning with new software in the Spring, your people will be comfortable with its functionality when the large Fall registration volumes hit.

Step 2 – Data Migration

It is wise to migrate customer information from your current system to the new system to save time and to eliminate data entry errors. This provides you with the perfect opportunity to scrub your list of any old or inaccurate customer information. If possible, run a mock data migration to verify what data will be properly moved over to the new system prior to performing your actual data migration. Most systems are not able to import historical financial transactions, so it is a good idea to enter the carry over balances from the old system into the new system on the official day you cut over to the new system.. Keep the old system available for a time period, so your staff has a reference for clarifying discrepancies and can answer questions about the details of the carry over balances.

Step 3 – Staff Training

Be sure software users have been trained sufficiently and have had time to “practice” with the new software. If your people are not properly trained, they may initially stumble through their processes and present a very bad first impression and put a damper on the positive momentum of implementing a new system.

Make sure that your staff can perform common tasks, such as looking up customer information, registering new students, entering fees and payments and printing financial reports and class rolls. It is wise to have a designated internal “expert” to serve as a support person to whom all questions about the software are directed. This will help in standardizing procedures and lessen your dependency on the software vendor’s support services.

Step 4 – On-Going Training & Automation

It is common for schools that have implemented new software to fail in utilizing all of their software's valuable features. Functionality used on a daily basis is adopted quickly; however, enhancements and added features may be overlooked. Make time to review each feature available in your software on a quarterly basis so that you take full advantage of your system.

In summary, software can make your business easier to manage and easier to expand. To ensure that software products introduced into your business have the greatest potential impact, take the steps necessary to identify the best match for your needs and goals.