



INFORMATION THAT WORKS

**BUSINESS
INFOTECH**
SOLUTIONS, INC.

GUIDE TO A SUCCESSFUL SYSTEMS IMPLEMENTATION

Business Infotech Solutions, Inc. is an IT consulting company that works with your business to insure you are leveraging your accounting system and software investment to its fullest and maximizing its efficiency. With over 30 years of experience, our team of professionals can work with you through every phase of the cycle- from discovery, system selection and integration through post-implementation support. We can navigate you through the entire system transition process or through just the phases you specify, providing you with the confidence and expertise to get the most out of your technology investment.

We realize that although we have successfully implemented systems conversions for dozens of companies, this process can be daunting to a business undergoing a conversion for the first time. In an effort to prepare our clients for a systems conversion or installation, we have developed this guide to outline best practices for a successful implementation.

Installation vs. Implementation

Installation and implementation are two very different things. Often times, customers spend a significant amount of human and financial resources researching, investigating and evaluating various accounting systems before actually purchasing one. Although this phase is important, most of their challenges with a new system arise after the software is installed. The installation of the software isn't the final step in the process. In fact, there are many steps that need to occur between the software purchase and the install, and then after the install itself.

This set of steps is referred to as implementation. It involves system configurations, customizations, accurate data migration, testing, proper employee training and support. Without systematically following all of these "in between" steps, customers risk losing critical data and revenue with their systems conversion- a far cry from the increased efficiency they hoped to gain from their new system.

Steps to a Successful Implementation

A successful accounting system implementation is the result of detailed advance planning. Knowing which sequential steps to follow is critical to the process. Taking short cuts- either financially or skipping important phases – could generate long-term negative consequences.

A solid implementation strategy can be divided into the following steps:

1. Analysis and Planning
2. Installation/Configuration/Customization
3. Static Data Migration
4. Testing/Validation/Training
5. Final Migration/Go-Live
6. Post-Implementation/On-Going Support

This list encompasses best practices to follow which we have identified throughout the dozens of implementations we have managed for our clients. Following is additional detail on each of those steps.

I. Analysis and Planning

Prior to any software installation, we conduct a complete Business Process Review. We want to insure that the planned configuration will work on multiple levels for all departmental stakeholders. The BPR consists of interviews with both



INFORMATION THAT WORKS

**BUSINESS
INFOTECH**
SOLUTIONS, INC.

management and key employees. We analyze and document your workflows and processes in order to configure your new system to fit your business's needs. This phase also allows us to evaluate any existing, inefficient processes and provide suggestions on how to increase your productivity, efficiency and profitability.

2. Installation/Configuration/Customization

The actual installation of the software occurs after the initial planning and analysis of your existing processes. Once the system is configured it can be difficult to modify, which is why the planning and analysis phase in the previous step is critical.

The installation is not as simple as just loading a disk into your servers. Workstations and servers may need to be reconfigured. Moreover, the software itself may need to be customized to work with your business's specifications - set defaults, establish security mechanisms, tailor custom fields and filters, etc.

If inefficient processes were identified during the BPR, they should be addressed in this step to ensure that the new system's configuration works as part of that process improvement.

3. Static Data Migration

In this phase, we move all data that does not contain accounting balances from your old system to your new system. The data typically consists of information that is constant or "static" such as addresses, customer account information, vendors, shipment information, etc.

This step can be involved, as we take special precautions to ensure that the correct data is migrated to the appropriate place. For example, when we migrate an account to the new system we write a program to match the customer name with their account number, address and credit card number. This process is referred to as "mapping". We may also encounter issues when mapping the data due to bad data in the existing system (such as invalid zip codes or address information).

Business Infotech Solutions has extensive experience in programming and database mapping. We have successfully migrated critical data from one system to another for several clients and are prepared to address and resolve any challenges that may arise.

4. Testing/Validation/Training

Once the static migration is complete, we begin testing the system and validating that the system was configured correctly. We perform several "dry runs" with actual client data to evaluate and prove that the system is working properly and as planned.

We also begin training your key employees and stakeholders at this point. As the primary users, charging specified employees with testing the system as well will assist in uncovering any challenges or hidden issues that may have occurred with the data migration. Furthermore, your goal should be to have all primary users feel comfortable with the new system and completely trained before the designated Go Live date and Final Migration of "live" data (dynamic data involving actual accounting balances and transactions).

Depending on your resources and budget, we can train your employees a number of different ways. For smaller companies, we can schedule training sessions or one-on-one sessions for each employee as they gain hands-on experience. Another option is to host webinars or remote internet training sessions for employees such as regional sales people who may be



INFORMATION THAT WORKS

BUSINESS
INFOTECH
SOLUTIONS, INC.

based out of state or even internationally. For larger companies with dozens of employees to train, we can train a select group of employees who you have identified as being capable of training their fellow employees. Regardless of which option is best for your company, Business Infotech Solutions can train your staff. Properly trained users are essential to the success of your implementation. If the primary users are frustrated because they do not know how to use the new system or lack the knowledge of how to maximize its potential, the new system and your investment will not make your business more efficient.

5. Final Migration/Go-Live

The day on which the new system is fully activated is referred to as the Go-Live date. All of the preparation, testing and training are in preparation for this step. It is best to activate the system over a weekend, when your business is closed or slower to allow for minimal disruptions. Our staff is on-site at your company the week preceding the Go-Live date, preparing the system.

Before we perform the final migration of the active data, we update the static data one last time to insure it reflects any recent changes and is current. Once the static data updates are complete, we import all of your accounting data such as account balances, AR and AP balances, inventory balances, etc. We provide you with hard copy reports as validation that the accounting balances in the new system match the balances in the old system. You will approve these reports before we activate the system, and you should retain these for your tax records to prove that the system was balanced when it was converted. At this point, any pending orders are added to the system.

Our staff remains on-site with your team for the first few days after the Go Live date. We will assist with any issues that arise and answer questions your staff may have now that the system is activated. After several days of using the system, we hold a follow-up session with you and the users to review the process, identify any outstanding issues and to discuss any next steps or ongoing support.

6. Post-Implementation and Ongoing Support

We understand that until you and your employees are completely comfortable with your new system, you will require support post-implementation. We anticipate a larger support need in the first few weeks while your company acclimates to the system. In fact, we encourage you to call for support if you have a question on a new process as opposed to entering something incorrectly. Our goal is for you and your team to feel confident in using your system, and we will be there to guide you. After the first few weeks, your employees will require less support as they become more familiar with the system and the new processes become integrated into their daily routine.

7. E-Commerce Site Implementations

We also have extensive experience managing implementations for e-commerce sites. If you operate a web store, we will add a few phases to the implementation steps outlined above to address modifications that must be integrated into this area of your system. It increases the complexity of the implementation, but we have successfully integrated dozens of e-commerce sites for our clients.



INFORMATION THAT WORKS

**BUSINESS
INFOTECH**
SOLUTIONS, INC.

8. Estimation of Services

A systems implementation is a complicated process and the actual cost of an implementation depends upon the complexity of the work as well as variables that are company specific. For example, a system with “clean” data will be less complex to convert than one that has missing, invalid or corrupt data that needs to be corrected before migrating it to the new system. If you have hundreds of employees that you would like trained as opposed to dozens, your estimate may be a bit higher. If you have documented, systematic workflows that we can follow when implementing your system, your estimate may be a bit lower.

An industry benchmark for estimating implementations is typically 1:1.5 times the software licensing. For example, if you license a program for \$20,000 your implementation cost may approximate \$30,000. Again, this depends on the complexity of your implementation and the benchmark should only be used as a guide. A large company with a more expensive licensing cost due to the number of users may actually cost significantly less than the 1:1.5 ratio because they may already be operating under efficient, established operating protocols and procedures.

Our goal is to provide you with a realistic, accurate estimate for implementation services so that you can budget appropriately. As part of the estimating process, Business Infotech Solutions will schedule a meeting with you to review all variables so that we can develop a defined scope of work specific to your requirements.

9. Billing for Services

Business Infotech Solutions bills our clients on a monthly basis for work completed to-date. As a professional services provider, we bill hourly only for work performed and in 15 minute increments. We believe that billing in smaller increments is fairest to our clients, as you will only be billed for the work performed. We will not bill you a full hour for a task that takes 10 minutes to complete. Each month you will receive a report recapping how the time billed that month was incurred.

Our goal is to perform your implementation as efficiently and as cost effectively as possible. If we encounter an issue with your implementation that significantly impacts our initial estimate, we will inform you of that issue and how it effects our original estimate. We will schedule a meeting with you to collectively determine the best course of action, prior to incurring any incremental charges. We value our relationship with you and understand the reality of budget constraints. It is in our best interest to communicate openly and honestly with you.

Tips for Making an Implementation as Cost Efficient as Possible

- Don't skip any of the phases identified in an effort to reduce costs. You will undermine yourself, as your implementation will then cost more in the long run. The list we have prepared is based on best practices, and each step is vital to a successful implementation.
- Recognize the importance of the analysis and planning phase. The accuracy of the business process review- the willingness of key employees to participate and be honest about efficiencies- is the cornerstone of the project.
- Clean your data and make sure all records are as accurate as possible prior to beginning this process.



INFORMATION THAT WORKS

BUSINESS
INFOTECH
SOLUTIONS, INC.

- Keep customizations for the various software selections to a minimum. Tailor the systems and any requested reports only when they are an operational necessity.
- Migrate only the necessary data and information to the new system. You can maintain archived information for historical purposes on your old system, running it as secondary to your new system.
- Our job as consultants is to increase efficiency; therefore, our goal is to perform your implementation as cost effectively as possible. This is a very complex process, and we do not advise that you attempt to undertake the system implementation yourself unless you are an expert in this area. However, if we can identify areas that make more sense for you to perform in house or delegate to staff members, we will do so.
- Keep the lines of communication open. If you need time sensitive or critical items to be prioritized in the implementation, please let us know that during the planning stages. We can create an implementation schedule that allows us to address these critical items first and then address any secondary items later in the process.

Our primary goal at Business Infotech Solutions is to provide you with a successful systems implementation. We want you to walk away from your experience with us feeling confident in your software purchasing decision and ready to move your business forward more profitably.