



## Tips for a Smooth Implementation

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You've just signed on the dotted line for new software that will automate everything your staffing firm does - from applicant tracking to payroll. Now comes the hard part: making sure the software gets set up correctly and used to its full potential.

"The best software solution in the world is going to fail for the company if it's not implemented properly," says Mary Lynn Seaby, principal of Seaby Services and a consultant to staffing companies who focuses on technology.

It's a big investment - and a big risk for your business, since the automation software will affect everyone from the staffing coordinators to the accountants. Seaby, other experts and those who have been through software implementations offer these tips for a smooth transition.

### 1. Know why you're upgrading.

When Staffing Solutions Enterprises decided to upgrade its software, "we really wanted to make sure it took our business to the next level," says Sue Ann Naso, chief customer officer for the Cleveland-based staffing firm. For example, the firm wanted to use the software not just to keep track of what they had done, but to prompt them to follow up with clients. Using software to "manage our business vs. just our database" was the goal, Naso says.

This is one example of how to align a software purchase with business goals - something many companies fail to do, says David Reiss, president and chief executive officer of Applied Systems Technology, in Cornwall NY.

"They very often relegate the whole project to either an IT manager or a staff person," Reiss says. "They do that without ever having defined what business outcomes they're looking to accomplish."

Having business goals in mind will help with one set of crucial decisions. When the new software's way of doing a particular task differs from the company's current way, should you change the way you do business or try to change the software?

"I walk into many companies and they say, 'That's not the way we do it,'" Seaby says. "What you need to do is look at what the software is enabling you to do that's different from what you did before."

Still, it's probably not realistic to change every process in your office all at once. So you need to "pick your battles carefully," Reiss says.

### 2. Involve your staff from the beginning to the end.

When Henry Graeber was choosing new software for Pro Image Solutions, the staffing firm he owns in Orlando FL, he narrowed the field

to three systems he thought looked promising and then asked his staff to test and review them. The benefits were twofold: He benefited from the staff's input. And his staff transition to the new system a success.

"They bought into the system because they're the ones that basically recommended the system," Graeber says, noting that he agreed with their recommendation.

It's not practical to have everyone on staff helping make every decision about new software. But Sara Moss, a technology consultant to the staffing industry, recommends at least including the head of the accounting department, for example, in the part of the process that involves the accounting system. "They definitely have to live with it," says Moss, a partner at The Code Works Inc.

Moss also recommends showing the progress of the implementation to a cross-section of users - one from each department, perhaps, or one from each location if the agency has many offices - during the process, so there are no surprises when the system goes live. "Sit down with the users and say, 'Hey, let us show you what we have configured so far. Tell us if this is what you expect,'" Moss says.

### 3. Plan for problems.

Implementing a new software system is a huge project - whether you're converting from older software or replacing a paper-based system. Moss recommends

making a detailed plan, which should address issues such as whether to have all departments and locations start using the new system at once, or to roll the software out in stages.

The plan should also allow time for making sure the database is set up the way you want it, says Tom Sarach Jr., vice president of operations for COATS (Complete Office Automation for Temporary and Staffing Services), in Virginia Beach VA. "If you don't set it up right from the very beginning, you're going to be struggling with it through the entire process."

Another key issue is whether the old and new systems should run in parallel for a time. This can be difficult for the staff, who will be trying to learn a new system and simultaneously use the old system. But Seaby says most companies do this, at least for the payroll and accounting part of the system, to ensure accuracy.

When Naso's company cut over to its new system, staff members simply switched to the new front-office system on the day the new software went live. But they ran payroll on both the old and new systems for a few weeks, checking to make sure the numbers matched.

Once the plan is in place, one person should be the project manager, responsible for making sure all the steps are carried out on time. In some cases, it may be a consultant whom you hire specifically for the implementation. In others, it could be an IT manager or even a skilled, organized executive assistant. It's important that the person have experience managing complex projects - preferably technology projects.

### 4. Use IT wisely.

Whoever normally handles your technology needs - an internal staff member or department or an outside contractor - must be involved in the implementation. But that doesn't mean simply handing the entire process over to IT.

The IT department or contractor is generally responsible for making sure the company has the right servers, network connection and a backup plan, Reiss says. "IT managers should be dealing primarily with infrastructure issues and making sure that in the appropriate areas, risks are being mitigated," he says.

Because of this, the IT person in charge needs to communicate with the vendor to make sure the setup goes smoothly. "We need to be in touch with that person very early in the process," Sarach says.

Decisions about business processes and how staff members will use the system, though, should be made with input from business users, not solely by IT personnel. IT staff may not know what would be most helpful for the business and don't have the authority to tell staff members to do their jobs differently.

### 5. Clean up your data.

If your company is already using some sort of database, a key part of the implementation process will be moving data from your old database to the new one.

When Wilton CT staffing firm Staff Providers replaced its database, "a lot of what got transferred into the new system was a lot of dead wood," says Lisa Chubinsky, principal. Some companies had moved out of town; some companies were no longer in business. If she had it to do again, she says, she would have made sure these entries were deleted before the conversion.

This is exactly what experts recommend: Make sure, for example, that one client isn't listed in the database under several versions of its name. It's also important to spend time making sure the data fields are transferring correctly from the old database to the new. Vendors usually take charge of this process, Seaby says, but the client has to be involved to check the data.

Even when some cleanup is done beforehand, expect some problems to slip through the cracks. Naso said her company cleaned up a lot of information in its database before the transfer, but didn't consolidate multiple accounts for companies that had several locations. In the new software, these needed to be listed in the same file. As a result, "there were several features in the new system we weren't able to take advantage of," until they fixed the problem, Naso says.

### 6. Make training manageable.

You can send staff members to training at the vendor's office. You can bring the vendor's trainers on site. You can offer group training, training for each department or one-on-one training. Some training can be done online or over the phone. The key is to give people the best training with the least disruption to your business. After all, training time comes out of the time your staff would otherwise be doing their work.

"Our service is just running at 100 miles an hour," says Laura Diaz, president of Primary Staffing in Chicago. "We broke the schedule up." To get everyone training while keeping the office running, she sent her staff out for training, but not all at once.

If training is on site, Seaby recommends doing it in short segments so users don't burn out. The week before the system goes live is a good time for initial training, she says. Focus on basic issues: "This is what is going to happen on Monday morning. This is how you process a job order." On the first day the new system is used, Seaby recommends forgoing formal training sessions and instead having trainers - who could be previously trained staff members, vendor representatives or consultants - go from desk to desk to offer assistance.

### 7. Make sure people use the new system.

It doesn't matter how good the new software is at generating reports on the business if staff members don't actually enter all the new job orders into the system. And the fancy new database will become much less useful if each person entering data uses the "comments" field for something different, for example.

"In every single organization, there are going to be people who adapt to the new computer software readily and others who resist it," Seaby says. You need accountability to make sure even those who are

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reluctant to, in fact, use the system.

Chubinsky made clear to her staff that using the system was not optional - and provided the help they needed to do it. "We had them take full advantage of calling the support line," she says. She didn't want a staffing coordinator spending hours trying to figure out how to do a particular task with the software.

Diaz says she found it helpful to explain to her staff both why it was important to use the system and why it was safe to let go of the paper-based system they were used to.

"At the beginning it was hard getting people to let go of the paper," she says. Some worried about what would happen if the system went down. "We informed them that we back up every day."

Reiss says that if staff members get the sense that using the software isn't important to the top managers, they will be unlikely to do it themselves. "Ultimately, people will dance according to the music that comes from the top."

#### 8. Continue training and implementing new features.

>A year after starting to use his new software, Graeber offered more training for his staff. "It's impossible to expect the staff to use all the features that are there initially," he says. "You can't grasp everything."

So once the staff had mastered the basics, he set up some phone and online courses to get them to use some of the system's more advanced features. "It gave them a system," he says.

This sort of ongoing training is important if you want to get your money's worth out of the technology. Phil McMahon, vice president and cofounder of Bridgewater Systems in Vestal NY, tells clients to think carefully every time they find themselves using an Excel spreadsheet to tabulate or analyze data from their database. "That's when you go back to your vendor and say, "Is there a way that I can do this within our current system?" he says. Most likely, the system could be running those reports automatically.

These systems are a big investment - one you want to make pay off with ongoing adjustments. "To leave it alone until it's a problem - I think that's a missed opportunity."

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