SaaS Implementation Best Practices

For many organizations, software implementations often fail. They go over budget, miss deadlines for going live, lack cross-functional buy-in, and more.

When you invest in new software, it's in your best interest to ensure the implementation is efficient, clean, and fast so as to quickly provide a return on that investment.

Let's take a look at the 10 best practices you can use to implement mission-critical software.

Define Success

Every project should begin by defining success metrics both internally to your teams as well as to your broader audience.

This phase should start every implementation throughout your company.

When defining success, it's crucial to be completely clear on what's in scope and what's out of scope for each particular project.

The shared vision of success serves to keep everyone on track. Identify the point you want to keep Insight throughout and implementation to evaluate scope, timeline, and dependencies.

Establish Requirements in Advance

The main question you should focus on is, “What justifies the value proposition of the platform?”

Heading into any kind of acquisition process, when you’re evaluating multiple service providers, SaaS vendor salespeople will talk to you about all the bells and whistles.

They cover every feature of the product and what it can do for you, and may even try to convince you that your business needs all of it, even when you don’t. But, you don’t need a Rolls Royce to go down the street.

It’s important to cut through the noise and be able to clarify the specific business requirements and functionality that you need to be successful, and then build your implementation plan for that.

Go through every solution you evaluate to ensure that the one you select will be able to meet your requirements. Then, to build consensus among others involved in the project, including stakeholders, start an outreach to any impacted department.

Gather objectives across those business units. Use their input to build out your full list of requirements.

Involving the end users of the new SaaS software solution in the future to understand how they will interact with the system and how their specific workflows will support your business objectives.

Discuss how to ideally configure the system to keep things as smooth and simple as possible for users.

Reach out to the vendors to discuss pricing and other details if feedback from end users indicates something outside of what was originally discussed with the vendor.

Make a Plan

In the planning phase, things are focused on articulating and distinguishing between your business goals and project objectives.

Your project objectives are specifically related to how the implementation process is managed.

Your business goals are what your business hopes to achieve through the implementation. Project objectives need to tie into your business objectives.

Establish the Project Structure and Roles

All implementations must be viewed as a joint project with a single team. But within that team, there has to be clarity around each individual's roles.

Define what is the responsibility of your internal team and what the software partner should do.

The clearer the roles are, the faster you can identify the key resources you need as the project moves forward.

- Who will handle the project management in house? Who else is on that team?
- Who should we contact for customer support? Who else is on that team?

Align the Entire Company

Once the SaaS solution is selected, everyone is excited and happy.

But somewhere around the project midpoint, you find a dependency that's out of touch, you lose project resources, find other priorities gain importance, and you see your timeline start to slip.

To avoid this issue, getting the entire team on the same page is crucial.

Any implementation is too big of a project for a single person. You must distribute the decision-making.

The senior leadership needs to be clear from the beginning and give the authority necessary to empower their team to get the implementation finished.

The buy-in should not be limited to the people who evaluate the solution but also from the people who will use it.

The actual users need to see how a solution will enable them to get their jobs done.

They should have the opportunity to give their feedback in the early stages and throughout the entire implementation process.

> *For the greatest chance of success, involve more than just the executives and stakeholders. The more departments involved, the better you can expect the process to go.*

Communicate

When there is a cross-functional team working on implementation, the most important thing is communication. In the case of an aggressive timeline, quick feedback, and direct communication it is essential for success.

You should work to communicate intentionally and create a communication strategy that has measures in place to ensure that everyone is communicating accordingly.

Encourage your team to reach out proactively if they are against a new risk or a roadblock or when the situation is changing or a deadline is approaching.

When a large number of people are involved in a project, you cannot afford to do a single weekly meeting where everyone goes around the table and provides an update.

The right strategy to segment the appropriate communication to the appropriate people at the right time is necessary for the project’s success.

But you can’t do this if people are too attached to their roles. It’s important that everyone knows when someone else has and will communicate it if and when it becomes necessary.

Everyone needs to focus on what they're supposed to be doing while trusting that everyone else will communicate what they need to when they need to. When you foster a culture of autonomy and direct communication, everyone feels comfortable raising a flag when it becomes necessary.

Dedicate Resources in Terms of Priority

If you want a project to be successful, early intent for your resources is important.

It's crucial to identify any critical dependencies and resources from the start to make sure that the resources are available and will be for the duration of the implementation project.

Identifying resources, teams often focus solely on technical resources. While the IT resources are essential, it's important to remember that development is not the only critical resource required for implementation.

The business configuration is just as crucial to meeting your timeline.

People have their own job to do in addition to any implementation activities so it's important to stick to your timeline so that you have the commitment of these people at the right phase of deployment.

Establish a Clear Project Hierarchy

It is important to establish a clear project hierarchy. Identify the decision-makers, build a timeline calendar for the core team members that includes the dates for milestones. Include who will sign off on key deliverables and milestones and various points of auscultation.

The project governance needs to serve as your guide. Once you check a box, the team can agree that it's done and move on to the next thing. This requires discipline from both sides.

Critical Path Analysis

All implementations are a balance between timeline and scope. There's a solid date, you must be willing to compromise on the scope.

When you want to get everything done, you'll often wind up getting nothing done so it's important to highlight what must be done by that deadline.

Constant prioritizing is a more productive approach. Getting everyone to agree about what is important allows you to frame all of your decisions in the shed contact. It's important to be on the lookout for risks and ways to mitigate them.

Our recommendation is that our customers go live first, then stabilize the system, and then add on the features.

The startup mentality is to always shoot for the minimum viable product or the appropriate to your value to the investment.

Plan Go-Live Support in Advance

To ensure business continuity and successful implementation, you should be completely ready for action once you launch.

One of the most common issues with the roll-out of SaaS applications is the failure to account for the full range of possibilities when it's time to go live.

The most successful teams always go beyond what they think they'll need because over-preparing means it's possible to cut back on resources as needed. If you find that you need to catch up from behind, it could pose a number of issues.

Invite stakeholders to brainstorm to discover any possible problems that may come up during the go-live. Then, put support in place in terms of people and strategy, to respond to those scenarios.

Following these 10 best practices should help you get through any new technology implementation with happy users and stakeholders.

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