Lead Your Implementation
Don't be Led by the Vendor

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A hands-on approach is key as you go through an implementation project. You want to have your needs already in mind. Discovering unexpected needs too late in the project can be detrimental to your pre-supposed timelines. When a timeline gets stretched, your budget gets stretched as well. Here are the top 3 practical steps to take so you remain in the driver's seat during your implementation.

1. UNDERSTAND WHAT THE VENDOR EXPECTS FROM YOU

Once you have chosen your system, talk to your vendor and get a list of your organization's responsibilities throughout the project. If you haven't gone through a system implementation recently or at all, it is important to reach out to others to get an idea of what that time commitment is.

Reach out to your community, maybe fellow members that you know in the American Payroll Association, or user groups and find out what their implementation experiences have been like. Or speak to some references that recently implemented your chosen system. Ask them how much time they've had to spend on this actual project in addition to their daily work. Then you will be prepared to dive deeper when the vendor comes on site for the initial kick off and analysis sessions.

- How many people do you typically see involved in this type of project?
- What are the roles?
- Who is the best person to fill each role?
- How much time do they need to spend on it?

Going through these steps will prevent you from being blindsided on day one so you can go into your implementation with the right team already in place and with time carved out of their schedules to focus on the project.

2. DOCUMENT YOUR REQUIREMENTS

Nearly every vendor will give you the assignment to complete some kind of discovery or analysis workbook in advance of their initial meetings. When you were looking at a new system, you collected your requirements by working with people in your organization to define and record them. During the demonstrations, these requirements were used as a basis for determining which system best fit your organization's needs.

But now, you will need something much more in-depth. This includes anything from your paid time off plans to your benefit eligibility rules to how each earning or deduction is calculated and taxed. It includes organizational structure and how it supports approval workflow, HR reporting, and the general ledger. The workbook defines each category to document.

Make sure you understand your exact current and future requirements before you take any other steps. The temptation, and sometimes the only choice, is to document exactly the way your system is set up or working now. But, there is a reason you are changing! Think about future needs and what is not currently working. Fix it now or live with it into the future.

This discovery/analysis workbook becomes the foundation for your entire configuration, for individual unit tests and, ultimately, for the sign-off decision to go live or not.

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3. OBTAIN AND MAINTAIN A DETAILED PROJECT PLAN

The vendor team will provide a high level project plan with key tasks, responsibilities, and milestones identified. It is your responsibility to fill in the significant detail that surrounds the tasks assigned to the client team. Once the discovery/analysis workbook and the analysis sessions are complete, client tasks generally focus on data mapping, test case development, assisting in the configuration, planning for and owning the testing process, and change management.

The detailed project plan will keep both your team and the vendor on track.

THE BENEFITS OF PARTNERSHIP

When planning something as critical and time consuming as an implementation, it can feel like you don't have enough knowledge or expertise in-house to tackle this alone. If that is the case, reaching out to a third party can be an effective solution for you.

Finding a partner with specific system expertise in your chosen solution provides an opportunity to have someone work with your department before, during, and after an implementation to:

- Guide discovery/analysis workbook decision-making
- Analyze timelines
- Design new work flow processes
- Provide extra hands for detailed tasks
- Help you to achieve specific departmental and company goals.

You can take the partnership with a third party further and specifically look for an outside expert to coach you on how to use your new system—and all of its features—to their fullest potential. An expert coach can show you in-person how to maximize your skills and can help you and your team discover any unused system functionality.

Whether you take the task on internally using these tips, or hire a partner who can bring their implementation knowledge and system experience to the project, your company will save time and money through a smoother, more controlled implementation process and have a new system that reflects your diligence.

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