

# KEY CONSIDERATIONS FOR A **SUCCESSFUL** SYSTEM IMPLEMENTATION



## **PLANNING RESOURCES**

The balance of work across a project lifetime is significant. Projects require considerable resources – the highest risk to success is to underestimate this.

## **VITAL DOCUMENTS**

There are a variety of essential documents which are vital tools to ensure your project remains on track. These include communication reports as well as status reports.



## **DATA MIGRATION**

We see many CRM implementation projects taking longer than they should because the data isn't ready. Clean, de-dupe, consolidate and rationalise your data before moving it to your new system. This takes time so get a head start on this process early.



## **COMMUNICATION WITH YOUR TECHNOLOGY PARTNER**

Having clear and honest communication with your technology partner is vital to success. Ensure you each have clearly established roles and responsibilities and have agreed targets, including KPI's.



## **TESTING THE SYSTEM**

The purpose of testing is to verify the system. It ensures the system meets the requirements that guided its design and development and performs its functions within an acceptable time. To help guide you through the testing phase, you should establish a clear test plan.



## **TRAINING YOUR TEAM**

Training is a key element in delivering successful implementations. It is important to deliver training that engages individuals and motivates them to embrace the change.



## **PLANNING YOUR GO-LIVE**

It's important to consider and plan your go-live as there will inevitably be an increased workload during the change. You must plan resources accordingly and only go-live when key resources are available.

