A Simple Checklist for Successful Implementation

Implementing new software is a major undertaking that typically involves several different departments within the company. This can make planning for implementation an intimidating task, but having a detailed and well thought out plan for the entire implementation process will help alleviate any anxiety. Use our simple checklist below and set yourself up for success.

Stage 1 - Planning

- **Map the implementation journey** – Many of our clients recommend implementing in phases. This can help you track progress and guard against missing any project milestones. It's also important to set realistic time lines and clear goals

- **Executive support** – Having support from the executive team will help remove roadblocks from your implementation project, making it a much smoother process

- **Create KPIs** – Having clear KPIs for your implementation is a good way to ensure you reach the goals you set regarding time line and budget. You can also use KPIs to track and measure the ROI expected from implementation

- **Infrastructure audit** – make sure existing IT infrastructure can support the new software you are implementing

- **Cleanse data** - Clean data will make a world of a difference when it comes to accuracy and measuring the ROI of your new software

- **Create a communication and engagement strategy** - Consistent communication is important in managing a change like software implementation. Communicating the benefits and project progress to your end users and stakeholders will help increase excitement and engagement

Stage 2 - Managing the project

- **Appoint a project manager and implementation team** – The project manager will be responsible for making sure the implementation stays on track and on budget. It's important to have someone who is completely dedicated to a successful implementation. The implementation team will be involved in the daily tasks of implementation. Your team may include the project manager, IT team, test group or pilot group and maybe even someone from finance or the executive team

A Simple Checklist for Successful Implementation

- **Start adoption campaign throughout company** – Be vocal about the implementation and get people excited about the project. Some clients have used surveys and competitions to engage their staff and others use sneak peeks as teasers. Whatever works for your company, get them excited

- **Back up data** - Now that you have clean data, you're ready to migrate it over to the new system. Make sure you backup all of your data locally to avoid any data loss during migration in case something goes wrong

- **Manage and update IT security** - As you'll be migrating important data, ensure your security is up to date and functioning properly, especially if you are in an industry that is heavily regulated or subject to specific compliance legislation

- **Track KPIs** - Keep track of the KPIs you've set for this project's success to make sure nothing falls behind schedule or goes over budget

---

- **Customise the software for your company** – Tailor the software to your company. Use vocabulary and imagery familiar to your employees. This will increase engagement and adoption of the new software

- **Test system before you go live** – Test, test and test again. It's important that you are confident that the system works properly before you go live. If it is too glitchy or there are glaring holes or mistakes, it will be difficult to convince end users to adopt the new system

- **Keep communicating during the project** - Especially with key stakeholders and executive team. Stick to the communication schedule you planned out and remember consistency is key

-

Stage 3 - Post Implementation

- **Continue the end user adoption campaign** – Keep people excited about using the new software to ensure a successful adoption

- **Communicate policy and procedure changes to company** – HR policies and procedures may change with the new software. If so, it's important to let people know what is expected of them

- **Plan for future growth** - look into how to get the most from the current system. Also, start planning for future growth of the company and how the software system can scale with you

As a HR professional, you are no doubt already familiar with many benefits of HR automation software, and building this same awareness and appreciation throughout your organisation is crucial to the ultimate success of your implementation. With a considered plan, consistent communication and engaged stakeholders, the implementation of your new software should prove to be an extremely rewarding time.