

SOFTWARE IMPLEMENTATION

SelectSoftware
Reviews



HOW TO IMPLEMENT A SOFTWARE PRODUCT

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WHAT IS SOFTWARE IMPLEMENTATION?



Software implementation is the process of adopting and integrating a software application into your company's existing systems and workflows.

The length, complexity, and cost of this process can vary depending on the size of your business and the nature of the software you're implementing.





**FACTORS THAT IMPACT
YOUR SOFTWARE
IMPLEMENTATION
PROCESS**



DOES THE SOFTWARE COVER ALL OF YOUR NEEDS OR JUST SOME OF THEM?

How comprehensive a software product is can impact your implementation timeline and cost.

For example, if you purchase an all-in-one software suite that covers all your needs and then some, this means you only have a single product to set up, and you won't be needing to integrate it with supplemental solutions or request for special customizations.

All-in-one suites tend to be expensive though if you only need one or two functions covered. If that's the case, it is wiser to go with one or two point solution that you can later integrate together, though do note that this might mean a longer implementation timeframe.

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DOES THE VENDOR OFFER IMPLEMENTATION SUPPORT?

Software vendors won't leave you high and dry. They usually offer assisted implementation services and (or at the very least) have a customer support team that'll answer specific questions and point you toward helpful resources.

Depending on the subscription you are on, you may even be assigned a dedicated account manager who's incentivized to retain your business and see that you are onboarded smoothly.

Opting for assisted implementation services is always recommended as you'll have product experts guiding you every step of the way until your go-live.

NOTE: In most cases, implementation services are billed separately from your monthly or annual subscription, and if you're on a budget, you can always choose to do the implementation yourself.





HOW IS THE SOFTWARE DEPLOYED?

Another variable that impacts your implementation process duration (and possibly its cost) is how your chosen software is deployed. Software products can either be cloud-based or self-hosted.

Cloud-based software products are relatively easy to implement. Once you've selected a vendor and purchased a plan that meets your needs, you can create an account and start configuring it right away, e.g import your data, invite relevant users, define metrics, etc.

Self-hosted solutions generally take longer to set up in comparison to their cloud-based counterparts. Depending on your chosen vendor, you may need to consult them regarding their product's compatibility with your company's hardware and installation process. You may even be able to have them send a representative to perform the installation on your behalf, which is always recommended for you to get up and running with the system as quickly and possible.



HOW TO IMPLEMENT A SOFTWARE PRODUCT?

If you're an SMB, you can either do the implementation yourself or have the relevant manager/department handle it per their needs.

If you're a large company with a product to be implemented across several departments or company-wide, you might need to put together an implementation team that includes a **project manager**, a **system administrator**, as well as **representatives** from each department that will be using the product to ensure their ideas and concerns are heard. Those representatives will also answer questions and help train their colleagues later on.



HERE IS WHAT YOUR IMPLEMENTATION TEAM WILL NEED TO DO:

-  1. Product installation (if any) and account creation
-  2. Data migration and/or upload
-  3. Configuration, customization, and integrations
-  4. User groups and permission levels
-  5. Employee access and product training

1 - PRODUCT INSTALLATION (IF ANY) AND ACCOUNT CREATION



The majority of software solutions today are cloud-based, delivered through a software-as-a-service infrastructure (SaaS).

Implementing a cloud-based solution is fairly quick; you won't be needing to install any files or worry about hosting the product - all you really need is a compatible internet browser. Since installation isn't necessary, your implementation team can go ahead and create an account for your company and enter important information such as company name, primary contact details, branding visuals, etc.

If the product you've purchased is self-hosted (on-premise), your implementation team will need to install the product on a server your company owns. This step might take some time and involve a few people depending on the size of your operation and existing hardware.



2 - DATA MIGRATION AND/OR UPLOAD



Once you have an account for your company, your implementation team can start uploading the relevant data to it (e.g employee data, customer data, etc..).

If you have been using a software product that's similar to the one you're implementing, your team will likely be able to import your data directly from it without having to upload records manually. You can check with your software vendor whether data migration from existing products is possible.



3 - CONFIGURATION, CUSTOMIZATION, AND INTEGRATIONS



This is the step where you tailor-make the product to your company's unique needs. Start by configuring the out-of-the-box features and settings of your product. Create spaces, templates, workflows, and more. You can also define relevant metrics, reminders, and notifications. Once that's done, you can proceed with customizations and integrations as needed.

Note: Check if the vendor has any [pre-built integration modules](#) with products in your tech stack or if they have an open API that your team can use to plug in custom solutions. You might also check if the vendor can create custom features for you but note that such requests usually come at a separate charge.



4 - USER GROUPS AND PERMISSION LEVELS

You may not always want to share the same level of access to your product with all employees alike. For example, you might want to give managers a higher level of access that enables them to add, modify and remove users and records, but share a “view only” access with subordinates.

If that’s the case, make sure you create user groups with the desired permission levels before you share access to the software with your employees. Doing it this way saves time as users will automatically inherit the permission level associated with the user group they’re added to and you won’t have to edit the permissions of each user individually.



5 - EMPLOYEE ACCESS AND PRODUCT TRAINING



Once all of the above is set, it's time to invite your employees to create accounts, assign them to the appropriate user group, and begin training them on how to use the product. If the product you've implemented is complicated and needs some getting used to, you might want to divide product training over several written/recorded courses and even conduct [User Acceptance Testing \(UAT\)](#).

Note: Before you create courses and record how-to tutorials in-house, check what training resources your software vendor has. More often than not, software vendors have several video tutorials and guides that explain how each feature of their product is used. If they do have such content, utilize it to speed up the training process.





OUR RECOMMENDATIONS

To ensure maximum success with your newly implemented product, here's what we recommend you do after your employees have had some time to use the product:



GATHER USER FEEDBACK:

Your implementation team might think that the product is easy enough to use but what do the rest of your employees think?

Find out about their experience with the product and whether or not they think it improved how they work. You might need to make some tweaks to the workflows you've initially designed or create additional customizations. You might even conclude that the software product is not good enough for your company, but you'll never know if you never ask.



REVIEW ROI METRICS:

Every software vendor claims their product can solve X amount of problems, reduce operational costs and maximize efficiency one way or another. It's important that you put those claims to the test and [see how their product has helped your company.](#)

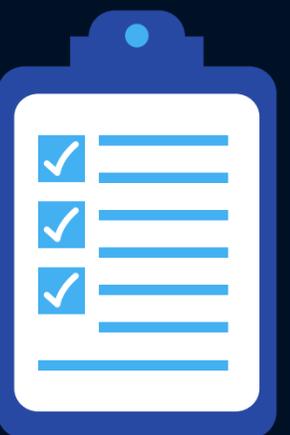
Make a list of your relevant pain points along with historical performance data and compare it to how your company is currently performing. Numbers never lie.



PLAN FOR DOWNTIME:

Software systems can go down and disrupt your company's daily operations. While we hope that never happens, it's important to have a backup plan should the software product you've just implemented stops working.

We recommend that you always have up-to-date backups of your data, and SOPs on how your employees can manually perform some of the processes they used to perform through the software.





FINAL THOUGHTS

Software implementation is best approached systematically. Create a plan that outlines what you need, when you need it, who will be helping you achieve it and how. This way, you ensure your needs and challenges are addressed in a timely and efficient manner.

We hope that you found this guide helpful. For more software best practices, check out our ebook on [getting the best pricing in HR tech.](#)



ADDITIONAL RESOURCES

How to Get Buy-In for Your Next HR Tech Purchase: the HR Tech Roadshow

For those interested in assembling a stellar negotiation team, this is a bulletproof playbook for securing internal support when buying new HR and TA software. In a nutshell, it's a guide to creating a roadshow to win over each key stakeholder.

[Read More](#)

HR and Recruiting Software Categories

We've spent over 7,000 hours researching the HR Tech ecosystem to come up with the vendor landscapes you'll find here. They are mostly organized by the employee lifecycle starting with the top of the recruiting funnel.

[Read More](#)

About **SelectSoftware**

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Buying B2B software is hard. We make it easy by finding the best vendors for a given category, highlighting their strengths and weaknesses, and giving you the advice you need to make the right decision.

Our research is free, unbiased, and based on the opinions of hundreds of industry experts and practitioners.

We save HR and TA teams time through unbiased, expert research that relies heavily on the expertise of forward thinking People people.

We'll give you the advice you need to make the right decision in the short term, and keep you up to date on the various trends in HR and talent acquisition tools as they evolve.

In addition to the best vendors in each space, we'll tell you how to manage internal stakeholders, build an ROI model, and avoid common pitfalls other HR leaders have run into.



CONNECT WITH US

CALL US

+1 (319) 481 2578

EMAIL US

hello@selectsoftwarereviews.com

