

Seamless Software Implementation: 5 Tips for Success

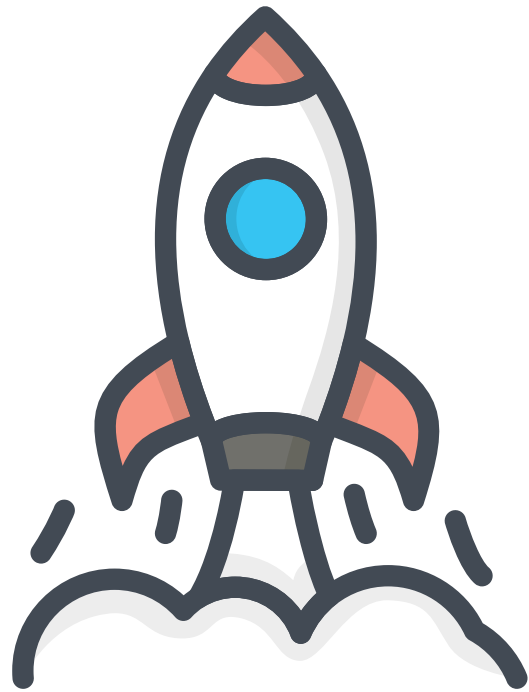


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INTRODUCTION

Implementing new software can be intimidating. No one wants to add complexities to the day. The desire for simplicity keeps some organizations from making a change... even changes that yield significant benefits.

All of us have limited time. Most of us have budgetary limitations. Only a few of us consider ourselves “tech savvy”. For these and other reasons, new software implementation is stressful.

No need for anxiety. This whitepaper will help you make a smooth transition to better technology. Proper planning, clear communication among stakeholders, and a focused long-term outlook are key.

Let us show you how stress-free new software implementation can be so you can reap the rewards.

**Enjoy the benefits of precise technology.
Ultimately, the best software reduces stress.
Don't let the stress of implementation stop
your organization from growing.**



There are five (5) steps to ensure your new software quickly generates positive results. They are:

- Mastering change management
- Achieving organizational clarity
- Creating a tech rollout plan
- Planning for initial and long-term training
- Supporting team accountability

MASTER CHANGE MANAGEMENT

Take time to reflect on how change affects your organization.

Not everyone in the organization will be comfortable with change. Ask yourself why. Do members fear failure? Do they have an aversion to technology? Something else?

Start with people-first considerations. Otherwise, you may doom implementation -- and rewards -- from the start.

Create an atmosphere using key tenets of “change management”:

Articulate the vision

What do you want to achieve using the software? Reflect on pain points and project goals. Some examples include:

- streamlining processes
- increasing transparency
- improving data collection and analysis
- enhancing user experience.

Make the case

Communicate to the team how the software will improve their day-to-day routines. Show how the software will help the organization achieve individual and organizational goals.

Engage the team

Arrange in-person discussions and listen to different members and departments. People tend to resist unwanted changes. So, get them involved in decision-making. You'll need people to be part of the process to get behind the change and help it succeed. Conversations help you identify enthusiastic individuals. These influencers help onboard slow adopters.

Support and empower the team

People want to know the value of any new system or process. By understanding the context people will be more confident in the organization's direction. Members adopt new processes at different speeds; slower learners will be more amenable to change if they understand the broader context.

ORGANIZATIONAL CLARITY

Implementing new technology has surprising additional benefits, too.

The preparation process reveals insights about your team and their processes. Use this moment to:

Review data

What data do you already evaluate? Where are the inconsistencies? What data would you like to know, if it were possible? How do you use historical data?

Analyze reporting needs

Which stakeholders require reports? Do you have to maintain records for compliance? How do you document lessons learned? How do this year's results impact next year? What reporting doesn't happen but would be helpful?

Define roles and responsibilities

Software implementation can reveal both gaps and overlaps in a process. This is valuable. Formalizing roles in relation to software use helps bridge the gaps and reduce double-work.

Define and optimize workflows

Spend time mapping how individuals and teams will use the new software. Use this as a conversation starter and make adjustments to the plan as required. A better understanding of your peers' processes will reveal the best approach to implementation.

CREATE A TECH ROLLOUT PLAN

Thorough planning saves time. Several tactics make the implementation process easier:

Set realistic timelines

Ideally, schedule new software implementation into your organization's slowest time of year. Slack in the timeline allows for inevitable, unexpected delays. Training needs vary. Some people may need extended or repeated sessions, so anticipate that and build it into your timeline.

Set small milestone goals. Reaching them helps start and maintain momentum.

Create internal training plans

Develop training plans for different groups in your organization. The plans should be clear, detailed, and encouraging. In particular, training should explicitly set guidelines for data collection.

Build a long-term plan for data quality

One of the best benefits of application and review software is data collection. Sloppy data entry will reduce the usability and impact of the software. This is a people issue, not an IT issue. Articulate the importance of data collection and how it relates to your mission.

Training must emphasize data collection best practices. Include specific formatting guidelines. Create a checklist of data collected at every step of the process. Checklists are a powerful tool for developing institutional knowledge. They are also useful for future training.

Develop internal and external communication strategies

Set regular times to check in with staff and the vendor's implementation team. These conversations are helpful to iterate and adapt. Encourage staff to take notes or share feedback in a centralized location.

INITIAL & LONG-TERM TRAINING

Training should not end when vendor training ends.

For best results, create an ongoing training program. Training that evolves with your organization ensures that you maximize use of the software.

First, designate a system administrator.

S/he will own the training plan. By proactively managing the training plan, the software can easily accommodate new staff and new processes. This person should gain deep knowledge of the software and make changes as necessary.

The best training is role-based and specific. It demonstrates the value of the software for every user. Checklists, mentioned earlier, are valuable.

Empower users to make personalized adjustments and give feedback. Often, this reveals additional software use cases. For example, a team member may discover that data formatted for her group is useful for another.

Second, select group leads.

These leads represent certain organizational areas. Leads help onboard new members. They should meet periodically to give feedback to the system administrator. Leads make recommendations for long-term training.



TEAM ACCOUNTABILITY

Accountability is a two-way street. Make expectations explicit for all parties.

This includes:

- **Expectations for users**
- **Expectations for the vendor**
- **Expectations for your continued education**

When outlining user expectations, be sure to tie software use to larger organizational goals. Reinforce these expectations in the training sessions. Empower users to make their own recommendations and encourage collaboration between groups. Celebrate milestones.

Hold your software vendor's team accountable, too. Expect their assistance. Remind them of agreed terms, if necessary. As the software becomes second-nature you'll rely less on their assistance.

Finally, remember accountability to yourself. All software is made more useful and productive through continued learning. Vendors typically offer online communities, in-person events, and conferences for users. Take advantage of these opportunities to deepen your knowledge. You'll benefit from the software and raise your profile as a leader, too.

CONCLUSION

Don't fear software implementation.

Application and review software is a valuable investment in operational efficiency. Advance planning and training make the implementation process a breeze.

By using specialized software your organization is better able to coordinate and scale efforts. Software opens up more time for work in the field, where the most impactful work happens. Make a commitment to implementation and reap the rewards.

We built OpenWater Grant Software to serve the people forging the path to a better tomorrow. Thank you for all you do!

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