

IMPLEMENTATION GUIDE TO SUCCESS



You've taken the time to carefully go through the selection process of your next accounting software and have made your decision! **NOW** it is finally time to start implementing your new accounting software. Are you ready?

The people at AcctTwo have been implementing accounting software in one form or another for more than 20 years. In that time, we have learned a thing or two, developed some opinions, and come up with some simple rules of thumb. And, this short ebook shares all you need to know – well not quite, but certainly a lot.

And if you don't want to read the whole thing, here are the top five points:

1. Assemble your dream team
2. Create a marketing/communications plan (yes, we accountants can do that)
3. Set realistic goals and expectations for the team
4. Don't make it more complicated than it needs to be
5. Test, test, and train





● ASSEMBLE YOUR DREAM TEAM

Whether you are a small company or a larger one, before the kick-off meeting, it is important to assemble a team and to assign each person with specific roles and responsibilities. From the most senior executive sponsor down. Ultimately, you need to make sure everyone understands what he/she is accountable for. From participating in the design meetings and signing off on the design to developing test scenarios and working through the scenarios. Think long and hard about having people on the team who are fighting the change and others who are huge advocates.

“Talent wins games, but teamwork and intelligence wins championships.” -Michael Jordan

Most importantly, figure out a way to recognize each participant's contribution. Each person still has his/her regular job to do. This is just piling on. Which leads into our second point.



CREATE A MARKETING/ COMMUNICATION PLAN

Sounds a little over the top? Well maybe, but so worth it. Implementing a new accounting software is going to impact a lot of people. Not just in accounting. Develop a plan to promote the project.

PROMOTION TOPICS:

- Why you are upgrading your accounting software and what benefits you expect to gain
- What the schedule you expect to follow is – acknowledging there likely will be some changes
- Who will be involved in the project and each person's role

You might also find it useful to create a short video with some of the cool features of the new software, like on-line dashboards, and with an interview of the executive sponsor.

And don't forget you will want to keep people informed along the way!

THINK ABOUT

- How you will inform people across the organization of the project's progress
- How you will acknowledge people's contribution
- Where people can go if they have questions or suggestions

Most importantly, have some fun here! You watch, you do this for your project, and next time around, someone will do it for his/hers.

“The two words information and communication are often used interchangeably, but they signify quite different things. Information is giving out; communication is getting through.” - Sydney Harris



Marketing Overview

It is a process to analyze the organization to focus resources on the greatest opportunities to increase and expand the company's profit. Marketing strategy's goal is to increase sales and achieve the desired results of a company's business and continue to do so. The objectives of marketing that has to do with gain have to accurately and consistently do so. The objectives will be based on how we measure your sales volume and marketing activities.

Product Categories	Profit per Year				
	2013	2014	2015	2016	2017
General tools	+50.82	+13.9	+60.82	+7207.75	+50.82
Health & Medical	-13.9	+52.94	+29.74	-29.00	-13.9
Art Supply	+52.94	+52.82	+52.84	+29.74	+52.82
Kids & Baby	+59.02	+59.02	+59.02	+59.02	+59.02



● DON'T MAKE IT MORE COMPLICATED THAN IT NEEDS TO BE

This is an extension of Point 3 above. Try to step back and design processes that are simple and require the least amount of steps to achieve the proper level of control and quality. This is not an opportunity for users and stakeholders to get exactly what they want or to gain “improvement” by automating a process that may not make sense to begin with. Keep this in mind – the most elegant solutions are generally the simplest.

“Simplicity is the ultimate sophistication.” - Leonardo da Vinci



● TEST, TEST, AND TRAIN

If you have ever done any kind of handiwork, you likely heard the expressions, **measure twice, cut once**. **Test, Test – get it**. And there are two important considerations here:

1. Design and document the test cases
2. Set aside the proper amount of time to test

This has the same impact of measuring twice, the likelihood of success will be SO much greater.

“Testing leads to failure, and failure leads to understanding.” - Burt Rutan

By following these simple rules of thumb, your project will have a greater chance of meeting the expected goals and you and the other people involved with the project will lead a happier, less stressful existence.



● FREQUENTLY ASKED QUESTIONS

To help you understand your implementation before you are in the throes of it, here are our most frequently asked questions:

Q: What's one of the biggest hurdles you see in an implementation?

A: It would have to be communicating changes that will occur with a new accounting system. We recommend having a conversation with the whole team to make sure everyone's on board.

Q: An implementation adds more work to the entire staff. What's the best way to motivate the team?

A: Stating from the beginning that they will have the leadership team's support is essential. This should be in addition to continuing to reassess the overall workload for your team. Incentivizing with coffee or added perks to let them know that they are valued also helps!

Q: What three things should I do before an implementation?

A: (1) Start thinking about change early; (2) have as much documented before you start; and (3) be disciplined – have a plan, document it, and stick to it.

Q: What's more important, achieving total success or finishing the implementation on time?

A: Project success should take priority. If your implementation became a bigger project than originally intended, or if you encountered any bottlenecks, don't try to move mountains to get it done if the date is negotiable.

Q: Will I know how are we doing compared to budget?

A: We keep a close eye on the budget and communicate it weekly during our status meetings. Any good implementer will do this.

Q: Will I know if we don't make our timeline?

A: Sometimes due to unforeseen client circumstances we can get off our time schedule. However, due to our constant communication, we generally catch it early and can remedy it. We consider vacation days, conferences, and any other blackout dates that come up in the beginning of the process.



Q: If I choose AcctTwo, who am I going to be working with and do they have the skillset that my company needs?

A: Our consultants have a wide breadth of experience across multiple industries. We match consultants with industry and unique skillsets needed for each project. You have gotten to know our sales organization and they have begun the discovery process that will be completed in depth during the project. They will pass along what they have learned to our consulting team to ensure a smooth transition.

Q: Will my pre-sales consultant be involved in the implementation?

A: We understand that you get attached during the sales process. However, our pre-sales consultant transitions you to our implementation consultant team.



ABOUT ACCTTWO

AcctTwo is a leading consulting firm and reseller of cloud-based accounting, ERP, Financial Planning & Analysis (FP&A), and Corporate Performance Management (CPM) software. Our sophisticated systems solve the issues growing middle market companies and nonprofit organizations face today. AcctTwo also provides Managed Accounting Services (MAS), allowing clients to focus on the core competencies of their business. We provide the people, processes, technology, and office facilities to perform these functions, while allowing clients to collaborate interactively through an on-line portal.

AcctTwo is headquartered in Houston, Texas. For more information, please visit [accttwo.com](https://www.accttwo.com) or call 713-744-8400.