

Brown Smith Wallace Consulting

Successful Software Selection Whitepaper Series

Getting It Right The First Time Is All About People

By Steve Epner, CSP and Jeff Gusdorf, CPA

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There is an old joke that says there are only two steps to software selection. Step one is to select a solution and step two is to throw it out. With forethought and a little effort – you can make a successful software selection, the first time, and skip step two altogether. The trick you see is all about people – it is your people who must participate in choosing a solution that meets your business needs and take ownership for its implementation and use.

People Factor One: Who Makes The Selection?

First and foremost is: “he (or she to be politically correct) who makes the decision is stuck with it.”

The best solutions include a team that represents all of the various levels of your business – from management, marketing and sales, purchasing, warehouse, logistics and finance. When you allow representation from multiple venues within the business you create a situation for success. When your selection team includes multiple voices the selection becomes a matter of pride -- everyone wants to participate in finding the best solution for the company.

In addition to creating “pride of ownership” a team consisting of a representative sample of end users will help distribute the selection burden by helping to define requirements – which will vary from department to department, attend demonstrations, call the references and be invested in the final selection.

People Factor Two: Creating “Buy-In” For Change

Another old saying goes: “the only person who likes change ... is a wet baby.” We all resist change. New systems can wreak havoc on our daily lives – introducing new procedures, changing why we do things the way we do – it can be pure torture and too often is, if allowed to be.

To succeed, make the selection and implementation a top priority. Let everyone know that the owners and top management are part of the team. Pick the most senior executive possible to lead the effort and make sure they take an active and very visible role throughout the project – give your employees a leader worth following.

People Factor Three: Did you ensure the converted data is accurate and complete?

The third area relates to moving data from the old system to the new one. Don't create an opportunity to fail by failing to follow-through with the conversion.

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We've found the best thing to do is have a small group of employees and support personnel from the vendors do and test the conversion.

Make sure the team has procedures in place to ensure that all of the data has been converted – check the simple things – compare the number of vendors, customers, outstanding invoices from one system to another.

Make sure everything is accurate. Develop checks and “hash” totals (total outstanding receivables, total open payables, etc. Audit the data before going live and you minimize problems. Find the problems before an existing customer cannot be found, or data is obviously wrong.

People Factor Four: Was there sufficient training and test time?

Finally, there is training and testing; more systems fail because companies underestimate the need to train their employees.

It does not matter how much the employees say they want the solution or how computer literate the staff may be, without a dedicated effort to train and test the system, you will fail.

The first two weeks with any new system are critical. If all of the time is spent fighting educational problems, you risk creating the perception that the new application is error prone, hard to learn, hard to use, not user friendly and probably the wrong choice.

Once that happens, it can be a fast death spiral into the ground. Users lose faith, and then they start to doubt the system, its capability and their ability to get any of the advantages promised by the sales people.

Here are a few hints to make sure you keep the training at a sufficient level.

First, if budgets are really an issue, try to negotiate a reduction in the total cost of training. Keep the courses and support that the vendor suggests but explore using CD or Web-based training instead of instructor-based training. This is much less expensive. Or have your best employees get trained and have them train other users. It is in your and the vendor's best interest to make sure the implementation is smooth and successful. They want you to be a showcase site. That means, they will often work with you on the approach to and cost of training if you let them know how serious you are to do it right – the first time.

Second, set up a test environment. We call it a sandbox. Let everyone play on the system as they get trained. The positive effects of training are reduced by the square of the time in hours between the end of training and when they get to next use the system. That means that if after training a week goes by with no system use, about 50 percent of the training is lost. Make sure that there is not only a place to play on the system, but that there is time as well. Get temps to help with the everyday work so your best people can be trying out the new systems.

Run full days of activity against a subset of all accounts and inventory. Print out all of the reports and make sure you and your staff understand where and how the numbers show up. Test everything to make sure it is right for the way you want to use it before it is mission critical.

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Looking For Help?

Successfully implementing a system is a big challenge. It is important that your team and the vendors' consulting organization work together to achieve this goal. The important thing to remember is you are not alone – there are experts, like the members of our team, who have successfully done this before and who are willing to guide you through the process.

About The Authors

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Steve Epner has been directing traffic on the information super highway since 1966. A highly regarded industry expert, Epner is widely published and has provided comment for national business publications including the *Wall Street Journal*. His experience in business, technology and strategic planning makes him a nationally renowned technical speaker.

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About The Brown Smith Wallace Consulting Group

The Brown Smith Wallace Consulting Group has been serving the distribution community for more than 20 years through the publication of the Distribution Software Guide, speaking at industry programs, giving free telephone advice to distributors and providing fee-based consulting services to companies who need help selecting the best software packages for their business.

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