



How to Choose an IT company and Implement software successfully



Hello and welcome to your special report.

Times continue to change and with the ever-increasing advances in technology, computers and IT, it can be a confusing and expensive minefield ... there is nothing worse than having an IT system that is unreliable and a system that works against you and not with you.

Your IT system without doubt is a crucial part of your business and without it your business wouldn't be able to function to its potential.

That's why it's so important that your IT system/software should be well researched and certainly not a decision to be made lightly...

Because a successful IT project can increase profits through new efficiencies, improve service levels to customers, boost company image and staff morale. These will then help to retain your customers and gain new ones.

A poor IT project can have the reverse effect, a significant negative impact on your company and the bottom line. It can take years to get over and leave scars that discourage you from using IT to improve your business.

But by following some simple guidelines and using common sense this should not happen.

Within this special report you'll find a wealth of information that's been gathered through extensive research, experience and after listening to people just like you, who've invested in IT systems and software

If you would like to discuss any ideas you have for IT development, please call me on **01604 797950** and I will be happy to help.

Andrew Revell
Managing Director
Abraqsys Business Systems

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1. Before You Begin, Define Your Objectives

Sometimes IT projects are delayed unnecessarily or may not even start at all. You are busy running your business. You haven't got the time to become an IT expert. How do you make that first start without all of your time getting swallowed up?

Because the field of IT is very wide, technical and fast-changing nowadays, no one person is going to have the answers to everything. So it would be impossible for you to know enough to find the best way to achieve your objectives. It is unlikely that anyone in your organisation could either. To be in this position you need to be immersed in IT for many years. In the same way that you have been immersed in your business.

When you know where you want to get to you need to enlist the help of skilled IT professionals who can show you all of the options and the implications of each so that you can make an informed decision. This way you get what you want at a level of investment that can be justified.

Define what you want to achieve

Before discussing the project with potential IT suppliers it is important to define exactly what you want to achieve. If you don't the project will be woolly and the end result won't match your expectations. A poorly defined project will suffer from 'scope creep' as forgotten things are added and you will end up with something that is bigger than you wanted, and that breaks the budget.

At this stage your requirements may only be a list of bullet points.

Plan Timescales

You will also want to consider timescales – when the project can start – when it should complete. This is important, especially if the project is to be delivered to fit in with the seasonal variations of your business. If you want a system ready before your busiest time of the year, you will need it in place in plenty of time for testing, training, familiarisation etc. For the new system to arrive in the middle of your peak period would be a recipe for disaster if your staff are already working under pressure. Other things that can impact on project timescales are how you wish to pay for it (fitting in with financial year ends), availability of your key staff, contractual obligations on existing systems etc.

At this early stage it might be helpful to identify the employees who will be involved (their level of involvement) and to get their input. To have people involved at an early stage helps to ensure that they are all part owners of the project and are motivated to see it a success.

To summarise...

- Set out system scope.
- Define “goals” for the proposed system.
- Identify project team and resources.
- Define timescales.



2. Choose Your IT Partner Wisely

It is not a good idea to appoint the first IT company that you find. Not all companies are the same; they have different skills, different specialities and different priorities. Is your first impression that you are dealing with a salesperson with neither technical nor business skills, or are you dealing with someone who you feel will understand your business as well as the technical complexities of what you are trying to achieve? Speak to about three companies and choose the one you feel will do the best job.

Define the profile of your IT Partner

Tell them what you plan to do and ask them plenty of questions. Satisfy yourself that they can match up to the following criteria...

- **Choose a well established company.** A lot of IT companies have emerged in the last few years and disappeared as quickly. You need to know that they are not going to stop answering the phone without notice. If they have supplied you with software you need to know that they are going to be around for many years to support you.
- **Do they provide flexible solutions or merely standardised systems?** A flexible solution is one that can be easily tailored when business needs change. If you are implementing a comprehensive computer system that is going to help you drive your business, you don't want to have to mould your business around a standardised software package that is rigid and cannot be changed. Choose a company that can customise the software to fit the business.
- **How do they provide help and support?** When IT companies get too large you become a number and not a valued customer. You find that they employ inexperienced "help desk" staff who just take notes. Finally they start to use automated phone systems. It's as if they actively discourage human interaction in an effort to reduce costs. Choose a company where you know you are going to get quick access to the people who know you and your systems.

- **Can they satisfy all of your IT requirements themselves?** It's good to deal with a single source of supply. You don't want a whole bunch of companies all addressing different aspects of IT. What happens if you have a problem? Will you be faced with a row of shrugging shoulders? Who will help?
- **Don't choose a company that is too technically focussed.** You don't want to buy a business system from a bunch of techies with no business knowledge. How would they help build a balance sheet or a costing analysis? Computer systems should solve business problems. For that you need business knowledge.
- **Their customers' experiences.** Finally, any IT company worth its salt will be proud of their customers and what they've helped them achieve. They should be willing to give you a list of happy people willing to share their experience. Pick up the phone and talk to a few.



3. Evaluating Your Proposals

Prior to presenting their proposal, your IT supplier should have spent enough time with you and your company to understand your business and your objectives. This is crucial in ensuring the system that you choose is exactly the right system for you

Make sure that any proposal addresses...

- **How your goals will be achieved.** This will make sure that all of your goals have been taken into consideration and understood. It will also identify any misunderstandings if the proposed end result does not match your expectations.
- **Volumes of data that the system is to handle** – allowing for any seasonal variations.
- **How the new system caters for business growth plans** so that reasonable and/or predicted increases in business do not bring any surprises, for example the new system cannot cope with the increased volume without a major upgrade (and therefore cost). You should also consider other things that may be impacted by increases, not just the system in hand, such as data backup implications.
- **Timescales** - is the work that has do be done by your company as well as your IT partner achievable in the timescales set? Are busy periods and holidays factored in? Remember that you business should not be interrupted and ideally your customers should be unaware that any changes are in progress.
- **Staff training.** Ultimately your staff are the people that'll use the system, to get the best ROI they will need to be correctly trained. This may be handled by your IT partner in its entirety or you may adopt the 'train the trainer' method, where your IT partner trains one or two key people in your company, who then train your staff. You should also consider whether training should be all at once, or phased.

- **End-user documentation** – is it to be on-line or hardcopy? Will it be produced by your IT partner or your own staff in their own words, as part of their training?
- **Project milestone recording and project management.** Without milestones you will not know if you are going to achieve your timescales. Without milestones things may be delivered before you are ready or could be missed altogether. Good project management will ensure that you get what you want, when you want, that you are in a position to receive them and that you can provide good feedback as to whether the deliverables are meeting your needs. Monitoring of the project will help ensure that if timescales start to go adrift, or the proposed system does not meet with your expectations, that matters can be remedied quickly and easily. Obviously the level of monitoring and management will vary dependant upon project. One that spans a year will need to be handled quite differently to one that might only be a couple of weeks.
- **Implementation** – will it need to be done in phases – will there be parallel running or a “big bang” approach? Both are valid approaches – it depends upon your requirements and resources.
- **Payments** – most companies will require a deposit. You should also ask that there is a retainer at the end of the project – payable when you are a happy satisfied customer.
- **Contracts** – as with most business arrangements a contract should be in place to protect the interests of both parties. The contract should make reference to all of the above points.



4. Running Your Project

Depending upon their scope, projects can run for days, weeks, month or years.

The frequency and level of contact that should be maintained with your IT partner will be affected by this and the complexity of the project.

Project Monitoring

The project should be planned in such a way as that there are definable milestones. You should know what these are and how you can satisfy yourself that they are being achieved.

You should never feel that you are being kept in the dark. If you are it means that milestone reporting and project management has broken down. You will be justifiably nervous. If you find yourself in this position you should contact your IT partner and request more regular contact and feedback.

Keeping it on Track

If things start to go wrong, you need to know as soon as possible and work with your IT partner to get the project back on track. Having a regular dialogue with them will help make sure you have no surprises.

Staging

For longer/larger projects it is advisable to have the system delivered in stages so that end-user acceptance testing can take place. If left until the end, this task will be so daunting that it is unlikely to get the attention it deserves.

System Testing

Testing of any system should look for..

- Errors in the business logic – any calculated data e.g. VAT, should be correct
- The system is not cumbersome – that the main functions can be executed within the available time
- Interfacing systems link cleanly and pass all required data

Data Transfer from Existing Systems

If data has been transferred from another system you should arrange a trial run to test that all data can be transferred successfully. If any start-up data is to be manually entered you should ensure that there is enough time to do this prior to go-live. In fact a good testing/training exercise is to build up the new data gradually using the new system well in advance of go-live.

- Note that when transferring data between systems (manually or automatically), it is a prime opportunity to clean and/or restructure your data.



5. Project Conclusion

At this point you should be happy with your new system. You have been kept informed of what has been happening, seen deliverables as they became available and approved them at each stage of the way. Both you and your staff should be looking forward to it going live and reaping the benefits.

Preparation for “Go-Live”

If the new system is a “mission critical” application that your company will depend upon, you must ensure before any old system is decommissioned and you go live with the new, that...

- If data has been transferred from another system or re-keyed you must satisfy yourself of its accuracy. If the volumes are large this may just be as simple of comparing totals in a spreadsheet (or from a report on an old system) to totals produced in the new system. Any differences (and they are likely to exist) should be explainable. e.g. all of the totals and ageing in an aged debt report should agree between systems – if the grand total agrees but the aging breakdown doesn't, can this be explained?
- Staff are adequately trained – because if they are not, even with the best of systems, the consequences could be disastrous.
- If you intend to parallel run with an existing system you should ensure that it spans at least one of the major system milestones e.g. a month-end run.
- Customers and suppliers are informed of any changes to your working practices that will affect them.
- Your goals, defined at the outset of the project, have been met.

And Finally...

Following these simple guidelines should help your systems and networks to form an alliance within your organisation and act as a strategic business partner that supports your business and it's potential growth.

Here at Abraqsys Business Systems we can provide you with a service and a system that will help to develop your business and business practices. We will help you to make the right decision based on what's most suitable for your business as well as your budget ... **we are not tied to any suppliers so you will be given ALL of the options.**

Your software can even be written for you so that it is tailored to meet your needs. You will be taken through an extensive 36 point process which will explore your business in absolute detail, to assess its requirements now and in the future.

More importantly we take the time to understand your day to day processes so that your software can form an integral part of your company, working with your staff to get the most from your team and your business.

Having read this guide, you may have many questions. They might relate to planned IT developments, a project that is not/has not delivered the desired results or might be non-specific. Please call me at Abraqsys Business Systems on **01604 797950** for a FREE, no-obligation consultation.

Your guarantee...

If you are not entirely satisfied with a new system, software or any other aspect of our service, we will redo, refit or replace to your absolute satisfaction.