The Definitive Deployment Guide for Planning Software

Your guide to a fast, easy, and affordable planning application deployment

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Table of contents

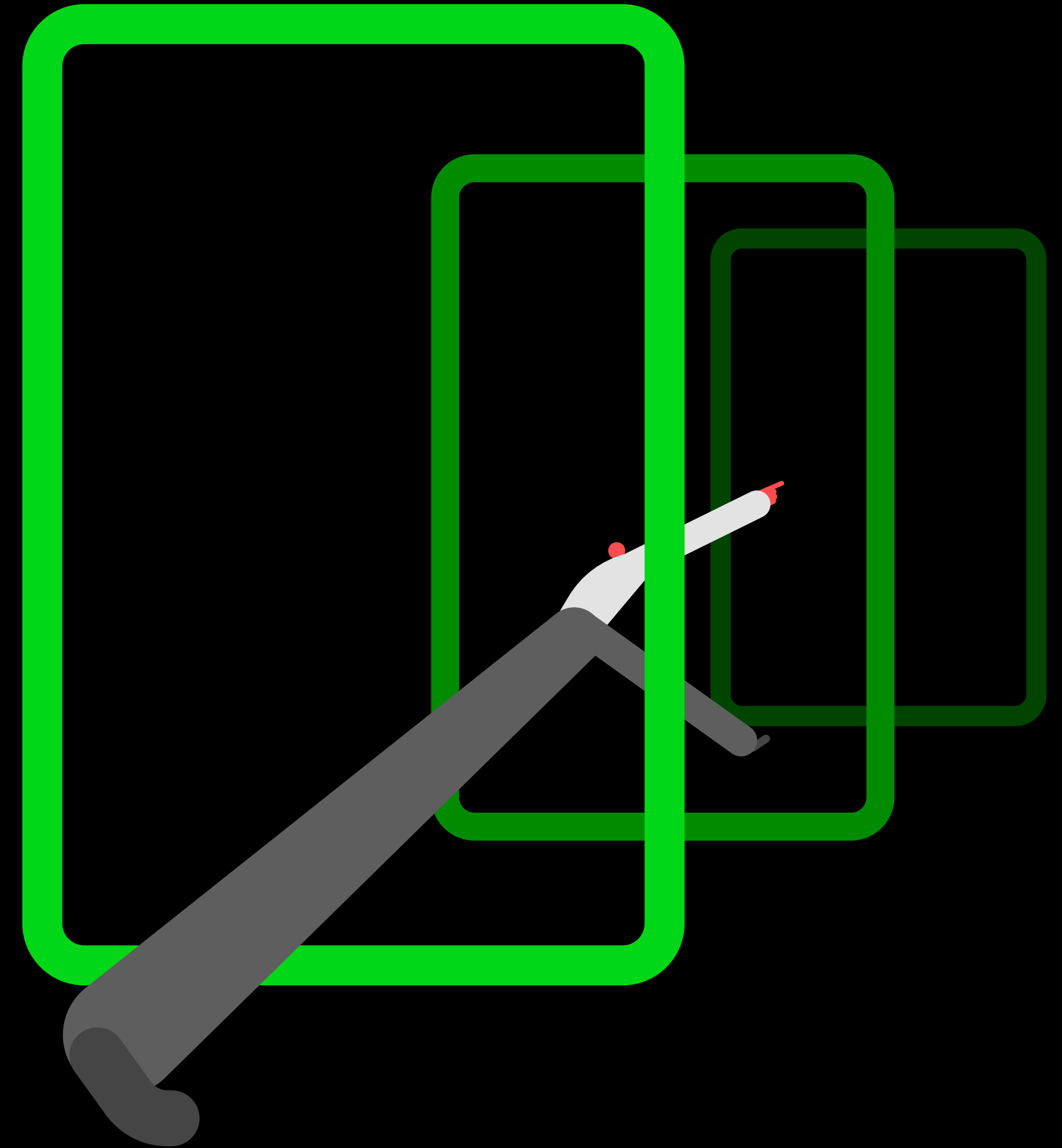Sage

It's time

In part 1 of this e-book series, "Building Your Business Case for Planning Software in Just 6 Steps", you learned how to justify the modernization of your planning process. In part 2, "The Definitive Buyer's Guide to Planning Software", you learned how to select the right solution for your unique business needs. Now, having selected the right solution, it's time to put it to work automating manual tasks, eliminating errors, and building a more effective, more strategic, and more impactful planning and decision-making process.

You should expect the deployment of your new solution to take just a few weeks. As with any project, however, a successful rollout takes some planning and a methodical approach. Most of the usual project management best-practices, such as creating a timeline, working in phases, and staying focused, are true here. But, with just a few additional considerations, you can increase the speed of deployment and lasting impact of your planning solution. Here's how.

Your checklist for successfully deploying your planning software

1. Start small and stay **focused**

2. Work in **phases** and stick to a timeline

3. Create a **budget** and stick to it

4. Celebrate **victories** along the way

5. Assume your business processes will **evolve**

6. Consider an implementation **partner**

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Start small and stay focused

Getting this technology up and running and into the hands of your teams is realistically a 2 to 3 week project. Of course, that's the first step on a new journey, but it gets you and your team off to a great start, quickly. Think of the first week as Phase 1.

In the first phase of deployment, it's best to focus on just a few business objectives. This makes it more manageable to accomplish a clear and successful milestone, and start delivering real value quickly.

For example, a lot of customers begin by focusing on these initial planning use cases:

1. Application setup

2. Basic revenue planning

3. Basic OPEX planning

4. Basic budget vs. actual P&L reporting

This approach lets you quickly begin the deployment while giving teams the opportunity to start planning, using interactive reports and dashboards, and realizing the power and potential of your chosen solution right away. It's also a great way for your users to get comfortable in the solution early and fast. That will help ensure that they continue to use and get value from it for years to come. From there, as your teams get more comfortable, you can start to bring more planning and budgeting processes online. Things like employee-level planning, detailed revenue planning, driver-based modeling, and monthly forecasting

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Create a phased timeline

With most modern cloud planning solutions, you could conceivably transition your entire planning operation all at once. But that would likely create an unrealistic amount of work, confuse and overwhelm your team, and run the risk of them not adopting the solution in the long run. Instead, set everyone up for maximum success by creating a realistic timeline where you bring distinct planning and budgeting processes onto the new solution in phases. Breaking things down into bite-sized pieces makes it more manageable for your users to learn and adopt, which is ultimately what you want. A typical phase would assume roughly 1 to 2 days of building and setting up the new process, another 1 to 2 days for solidifying the process and adjusting the workflow, and then a few more days for rolling it out to users.

Below is an example of a timeline for a 3-phase roll out. As you progress, and depending on your experience and resources, phases can also be overlapped to further speed the rollout. It all depends on how fast you want to move, and making sure you've chosen a solution that doesn't slow you down.
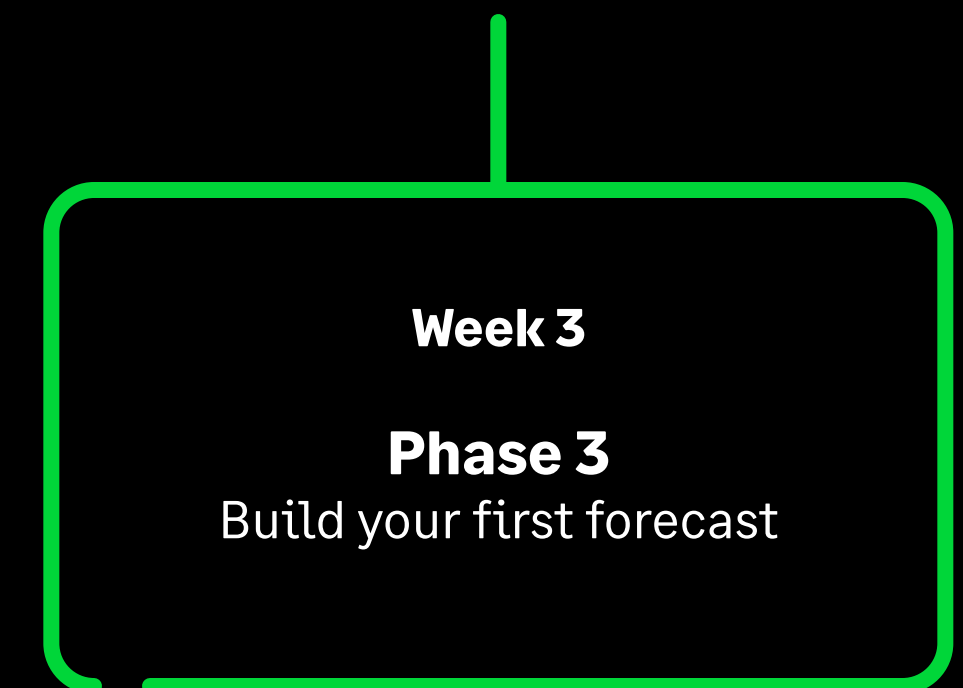
Upload Actuals data and dimensions from your GL, set up your dimensions and budget tree, build your first budget and begin budget vs. actual variance reporting.
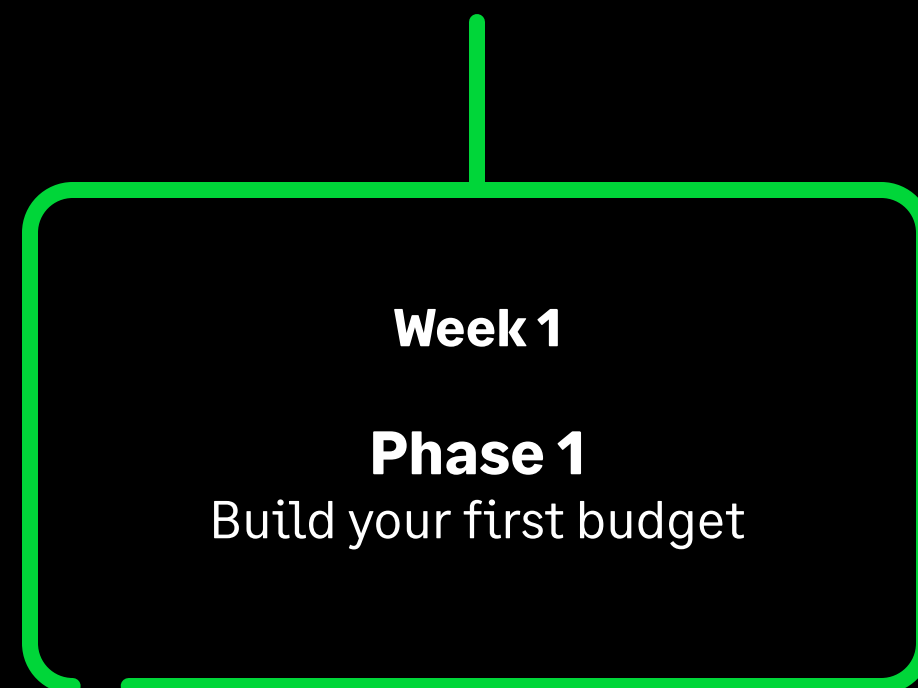
Build more advanced driver-based models, like detailed revenue and employee-level planning, and expand usage across the busines.
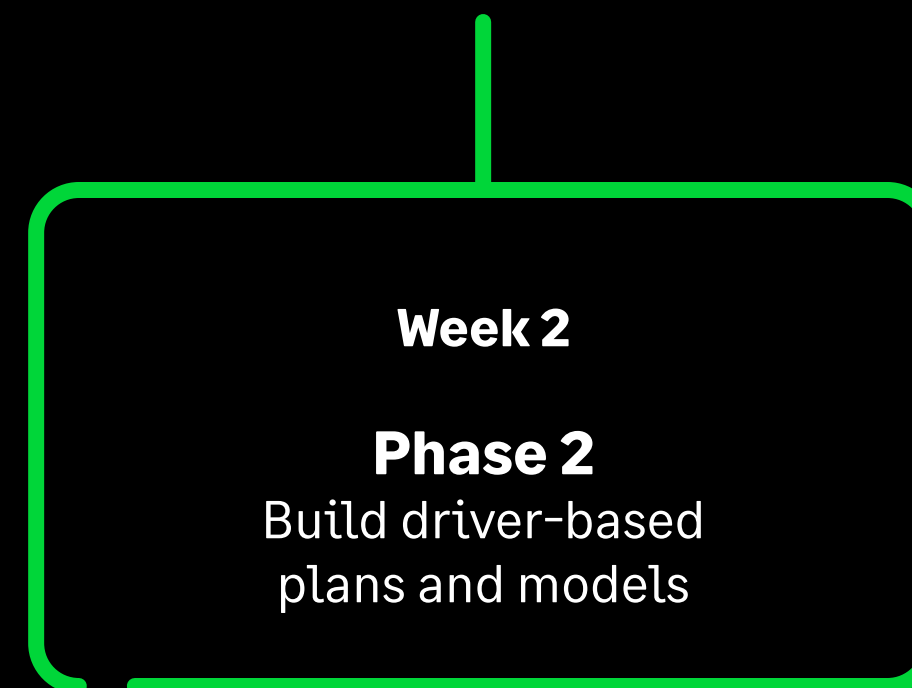
Build monthly forecasts and what-if scenarios to analyze multiple outcomes simultaneously based on different drivers and assumptions.

Week 1

Phase 1
Build your first budget

Week 2

Phase 2
Build driver-based plans and models

Week 3

Phase 3
Build your first forecast

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Stick to your budget

For cloud-based planning solutions, you should expect the cost of deployment to be about 1.5-times the cost of the annual subscription. These costs consist mainly of some minimal external assistance from the software provider's customer success team. This one-time cost is well-worth the investment because their product experts will guide you through the setup step-by-step, share best-practices and optimize you for success from day 1 (more on this later). Also, the expertise they pass along in this phase will make you more self-sufficient in future phases.

For internal resources, assume each day of each phase requires 1 to 2 hours of total effort over the 2 to 3 week duration. That's hands-on time where you and/or a small team will be working directly on the rollout. Choosing a defined set of use cases for your first few phases increases your experience and expertise on your chosen solution, which in turn minimizes the need for support in the future. That saves you money and puts you in control.

Remember, too, that ongoing support costs for modern planning solutions should be at or near zero. Technical product support provided by the software provider will be included in the annual subscription cost. And if you've selected software that's easy and intuitive to use and can be easily managed by a finance professional like yourself, then you can avoid those costly ongoing consulting costs

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Celebrate victories

Take time to recognize and celebrate wins and project milestones along the way. Even seemingly small wins can be bigger than you realize, and a celebration can be as simple as a round of applause in a team meeting, a nice team dinner, or as involved as you see fit. These celebrations are great for team morale, help maintain project momentum and keep everyone inspired by the ultimate mission.

Equally important is communicating these victories outside of your core team. Modernizing your planning process eventually benefits everyone in your organization, so let them know what you're doing, why, and how it impacts them. For executives and the stakeholders who approved the project, keep them up to date on progress so they see how the investment is being turned into huge wins across the organization. For those department budget owners, let them see what's in it for them. Show how this solution will save them time and headaches during budget season, make it easier for them to secure the money they need to achieve their goals, and get the insights they need to make better business decisions faster throughout the year.

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Leave room for evolution

Things change. Business is always changing and that means your planning process is always changing along with it. Be prepared for that change to flow into your planning application. For example, when you add new accounts or departments to your org structure, discover a new business requirement, see an opportunity to improve an existing process or find a new opportunity to extend the planning solution into areas you may not have considered. The key is to be able to roll with these changes with agility, and this is why it's so important that you've selected a software that your team can easily use and manage on your own. So, when you need to spin up a new driver-based model, or what-if scenario, or ad hoc analysis, you can do it all yourself in a matter of minutes. This empowers you to quickly adjust for any unforeseen changes in the business.

Assume your planning processes will evolve. They always do. Embrace the notion that this journey will never be completely done. You'll always find new ways to improve how you work, only now you'll have the tools and technology to implement those improvements in just a few clicks.

Consider an implementation partner

Modern software is supposed to be simple, intuitive, and easy to deploy. But this might be your first time implementing a new planning solution. You can definitely do it on your own, but you should expect a bit of a learning curve (like with anything new). The software might be totally new to you, your processes may be a bit more convoluted than you realized, or your data might be less accessible than you thought.

Whatever the bumps, implementation consultants have seen them many times before. Their experience can save you from the questions, the uncertainty, and the potential rework if you set something up incorrectly. They'll ask the questions you never thought to ask and help you think through different ideas and scenarios before making critical choices. They also bring subject matter expertise in FP&A as well as software implementation, which combine to help ensure you always know where best practices and industry standards can be applied. Typically, your software provider will have an in-house implementation team that you can use. Or you can use any one of a number of 3rd party consulting companies that specialize in this kind of work. In both cases, the deployment cost should be about 1.5X the cost of your annual subscription. This is a great way to ensure your success from day 1.
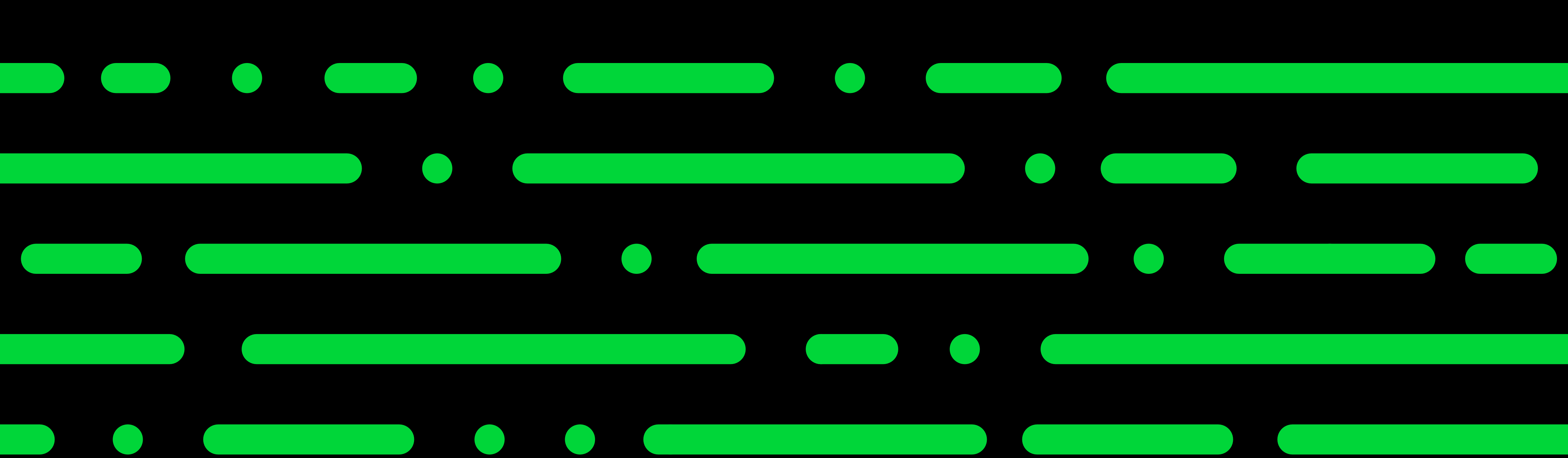
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Get started today

You've built and successfully justified your business case for planning software. You've selected the perfect solution for your business. And now you understand how to put that solution into practice. The only thing left to do is to start using it today!

Don't trudge through another cycle of manual planning and reporting. By this time next month, you could rise above the manual work, using new-found time, insights, and speed to adapt to fluid conditions, precisely monitor financial performance in real-time, and think more strategically about how to guide the business forward.

To learn how Sage Intacct Planning can help you thrive in today's ever-changing world, request a live demo today.

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