



Executing a Stress-Free Software Switch

From new installs to upgrades - ways to ensure the process goes smoothly

Anyone who has ever switched from one software system to another - scheduling/calendaring software or otherwise - knows that it can be a very challenging task on a variety of levels. Below are some steps you can take to help ensure that the process goes as smoothly as possible.

- **Go big** - Ensure that minimum hardware/software requirements have not only been met, but exceeded. You want your users to have a nice, long “honeymoon” with the new program before they’re interrupted by a hardware or peripheral software upgrade.
- **Invite input** - Meet with every group affected by the change - individually so they can voice concerns specific to their group. Then gather all of the groups to hash out any cross-department communication or procedural issues. Allow ample time for people to express any apprehension about the transition.
- **Do your homework** - Strongly encourage users to review the product documentation even before the software is installed. This enables them to have some familiarity with the system the first time they use it.
- **Can I get a witness?** - Put users in touch with others who have switched to the new system and have had positive experiences. A little reassurance goes a long way.
- **Ebb and flow** - If possible, make the switch during a lull in your organization’s activity. Nothing is more stressful than trying to master a new system with work piling up on your desk.
- **Baby steps** - When deploying an application organization-wide, consider a phased approach. While you want to have everyone using the new system as soon as possible, trying to address each department’s unique needs all at once can spread your IT staff thin and leave everyone disappointed in the support - and ultimately the product. An additional benefit of this approach is that those groups that make the transition first can assist in the training of later converts.
- **Share your struggles** - While your goal may be to have a seamless transition to your new system, seamless doesn’t have to mean invisible. Take some of the pressure off your staff by announcing to facility users that a software change is coming and that some minor disruptions in your business processes should be expected. People are generally more accepting of service issues when they are aware of them in advance.
- **Backup before moving forward** - Ideally you should be backing up your data nightly. While it’s likely that your software transition will come off without a hitch, having backups of your data for the days leading up to the switch will give you an additional level of comfort.

- **A bicycle built for two** - Consider running the old and new systems in tandem to provide reassurance to skeptical users. After a reasonable amount of time, wean users from the old software as quickly as possible and uninstall it so there's no lingering dependency.
- **Adult education** - If the software provider offers consulting or training assistance, take advantage of it. Minor misunderstandings about how a program works can, in some situations, fester into a full-blown backlash. Getting a clear and complete understanding of a new system up front can make a world of difference.
- **The buck stops here** - It's possible that your organization will have to make some difficult decisions in the course of your software shift - for example, regarding differing business processes that would be best if standardized. While a consultant can give you advice, you must ultimately have one person or committee within your organization that has the final say when groups reach an impasse.

Both immediate productivity and long-term satisfaction are at stake when you make the switch to a new or upgraded software system. A well-conceived and well-communicated transition plan can ensure that your organization hits the ground running and moves ahead confidently with the new software.

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