

Seven Best Practices to Guarantee the Success of SMB Deployments of SaaS

A white paper that outlines the best practices and potential roadblocks involved in the deployment of SaaS for small to mid-sized businesses.

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Overview

Although growing trends illustrate that enterprise corporations are moving towards on-demand Software as a Service (SaaS) solutions, traditionally this platform has been most popular with small to mid-sized businesses (SMBs). Online, hosted offerings present a cost effective option to more expensive, slower to deploy client server options. Regardless of the size of the customer, the deployment methodologies involved vary greatly from company to company. Smaller organizations tend to work with tighter budgets and often demand more services than they are willing or able to pay for. Developing a straightforward project plan and setting expectations from the beginning are essential practices of any deployment. However, these practices are exponentially important when dealing with the narrow margins of an SMB deployment.

How Can You Deliver Effective SMB Deployments?

Although every deployment contains its own custom aspects, the following best practices provide a general roadmap to success:

1 Don't make certain assumptions—We all know what happens when you assume... The same applies for software deployments. Enter pre-planning with a clean slate and probe for the information necessary to develop an effective approach rather than bring in trends from previous deployments.

- Just because the organization is small doesn't mean their requirements are simple. Business processes vary greatly from company to company and their complexities are not directly proportional to organization size.
- Be careful to not put too much stock in what the client "learned" during the sales process. Sales demonstrations are more often than not floods of material. Information gathered during a long sales cycle can easily be forgotten or misinterpreted.

2 Plan, plan, plan—A concise, definitive project plan is the simplest and most effective way to set client expectations. Not only will it help your consultants perform within both fiscal and time budgets but it also will allow clients to monitor the progression of the deployment.

- Start with an end goal and work backwards. Knowing where you are going is half the battle to getting there.
- SaaS software has created the notion of a remote deployment. Remote deployments often work well for clients with tight budgets, but be sure to convey to your clients the known risks of such an approach. Collaboration is always easier when in person, so be sure to schedule frequent check-ins via web conference and phone. As needed, and depending on the complexity of the engagement, an on-site deployment may be the best route.

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- The greatest challenge to successful deployments is when the consultant and client are not on the same page. Before beginning, confirm the scope and estimate of the project to avoid delays. This conversation will be much smoother if had from the start and not a week into the deployment.
- Create a “parking lot” to ensure that mission critical tasks are executed on time. It’s easy to be distracted by secondary priorities. Focus on the ‘must have’ objectives and park all other requests until you have fulfilled the top priorities. Time for deployments is always limited so it’s essential to choose which features/functionality is ‘nice to have’ versus ‘must have.’
- The best way to boost employee adoption of a new system is to have an internal resource that has been with the project from the start. Push the “train the trainer” approach with the expectation that the “trainer” will actively participate in the company-wide rollout.

3 Know who you are working with— Active involvement with a select group of internal resources provides the best avenue for success. However, too many voices will impede the process. Less is more when it comes to deployments and having a centralized decision making body will pay dividends.

- Identify who are the key decision makers. Confirm their availability and hold them to it especially if deploying remotely.
- Attain “C- Level” involvement whenever possible. Executive sponsorship will guarantee the maximum value and return on investment for the client.
- Ensure that middle managers are involved during testing and training since they will most fully utilize the system.

4 Communicate— Constantly keep clients informed with focused, concise emails.

- Provide daily updates on progress, percent complete, and key issues.
- Highlight any new requirements or changes in scope.

5 Execute— Now that your plan is developed, follow it! Stick to your established milestones and stay focused on your end goal. Closely abiding by a mutually agreed upon plan will increase employee satisfaction and reduce miscommunications. Product deployment is the first client interaction with your team and a smooth process will improve customer retention and business opportunities.

- Monitor your hours diligently to arrive as close to estimates as possible.
- Changes to the plan will occur. As soon as you need to deviate, tell the client in writing.
- Expect to say, “Let’s put that in the parking lot” often. Keep the client focused on mission critical processes and save fringe functionality for later.
- Do not let the client sit on the sidelines. Demand attention and involvement to ensure that they play an active role in the decision making process.

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6 Integrations—SMBs are always looking for ways to further streamline and automate their workflows and integrations provide an avenue to combine your SaaS offerings with already invested applications.

- In order to save the client and you both time and money, have detailed conversations regarding the level of need for integrations. Establish what integrations are required as well as a proposed timeline for when they need to be in place.

7 Handoff—A clean transition to your organization's support and client management infrastructure is a critical step to get your client off the ground running. When deployment is complete, provide your client with an updated plan that clearly illustrates project completion. Openly communicate the client's go-live status to your support group and be sure that the client is aware of support's availability. Be sure to detail any unique nuances of the client's configuration to ensure optimal internal knowledge.

Conclusion

No two deployments are the same. Much like the services they provide, small businesses have very unique processes and workflows with which they run their organizations. By following the above best practices, you will be able to navigate through these idiosyncrasies and complete a successful deployment that both meets client expectations and delivers your product on time and within budget.

About OpenAir

OpenAir, Inc., a NetSuite Inc. Company, is a leading provider of Software as a Service (SaaS) services automation software. OpenAir's Professional Services Automation (PSA) solution gives project-based organizations and firms the tools they need to grow their businesses quickly and profitably. Providing enterprise-level functionality for businesses of all sizes, OpenAir has more than 42,000 active users at over 300 world-class firms who use the software to better capture billable time, manage projects and resources, and bill customers. Coupled with a team of highly experienced consultants from some of the world's leading services firms, OpenAir PSA drives higher profits through improved utilization, visibility and data collection. To learn more, please visit www.openair.com.

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