

Overcoming Software Implementation and Training Issues

How customized workflows & manuals can increase efficiencies and ROI for Companies

Many companies find the 12-months following a new software rollout more turbulent than the rollout itself. Attempts to increase efficiencies and decrease costs can have the opposite effect; a drain of staff resources, decreased efficiencies, staff conflicts and ultimately attrition.

Why does this happen? How do we reverse this trend?

Let us examine a common real-world scenario:

A company decides to transition to new property management software and after performing **all of its due diligence, it settles upon "Package X"**. Budgets and timelines are established to accommodate data transfer, upgrades, migration and initial training. The company and its software vendor work closely together to transition to the new software.

The software vendor usually has an *intimate* understanding of its software, but a *general understanding of the client's business model*. Their **'software-first' approach** guides their software set-up recommendations.

The company, meanwhile, has an *intimate* understanding of its business model but a *vague* understanding of its new software. The company relies heavily on guidance from its software vendor, and follows its recommended software configuration with only minor changes.

This assumption on behalf of both the vendor and client creates the first opportunity for future frustration.

Software Training is often implemented in phases.

The first group to be trained finds that some of the processes the vendor configured do not match their internal processes and need to be modified. The new training manuals will have to be reprinted and new menus will have to be made before the next training classes. **The second training is fine. But during the third group's training it is discovered that additional processes will need to be modified.** These changes require additional costly manual and software revisions.

There are 4 more groups to train. But with limited time and resources the company decides to wait until all groups have been trained before updating the manuals and menus. The end result is seven groups trained to do things differently with improper documentation.

As this training process and budget comes to a close, the team receives news of 4 new hires, in different geographic regions, and a possible software update that may require additional training. And so the costly and wearing cycle of inadequate training and constant revisions continues...

Reversing the Trend

The desired result is to create a tool for the staff that will minimize errors, follow corporate policies, processes and procedures; a vehicle that would enable a newly hired staff member to begin working in the application without sending them through a time and resource-intensive training program. This **tool would not be a "Package X Software Manual", but rather "Our Manual for Software Package X"**.

The process begins by revisiting the existing workflows and menu sets, reviewing the responsibilities **for each "group" and modifying the menus to meet** *their* needs thus *increasing efficiency by achieving simplicity*. The updated, task-based layouts are now designed using common sense and real-world scenarios rather than programming logic. New user manuals are then created with detailed screenshots – step by step - for each process and procedure. The result? Support calls reduced by more than 80%. Accounting departments find additional time as the numbers of errors are decreased. Morale is increased since staff feels empowered with the knowledge to perform their tasks correctly.

As I have the opportunity to talk to more companies, I find the issue of integrating software into corporate business practices with limited training resources is one of the more frustrating, under-addressed, and systemic challenges our industry faces today. In most Companies, this issue has been **relegated to the "back-office" as a support problem**. In reality, it creates an undue financial burden by draining resources from support staff that could be put to better use. Additional effects ripple throughout your organization when an error spreads to your accounting department, audit findings, or Management Reviews.

Justification for in-house user manuals is obvious. *Increasing efficiency by achieving simplicity* makes practical and economic sense and allows you to focus on your clients, quality of service and core business operations.

We would like the opportunity to put our unique knowledge set and experience to work for you. Please feel free to contact us at (954) 298-2441 so we can discuss your situation and how we may best assist your team in developing *Your* unique custom workflows and manuals.

Feel free to pass this paper along to a colleague.

About the Author

Rick Friedman is President of **Everything Computes, Inc.**, a technology consulting firm based in South Florida. Rick spent more than a decade providing Information Technology services. With a passion for enabling non-profit organizations, he spent several years as Director of Communications, Technology and Compliance for a non-profit Affordable Housing Company. One of his responsibilities was to implement, support and provide training for their self-hosted Yardi Enterprise / Voyager software to their Corporate Headquarters and its 40+ properties covering 14+ states coast to coast. He was also responsible for ensuring subsidies were requested and received. Like many non-for-profits, the personnel budget could only support one person. This afforded Rick a tremendous opportunity to learn every aspect of the software from installation, configuration, support and as an end-user.

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