



**ENTER IF YOU DARE**

**Service Software Horror Stories  
that will chill you to the core**



# ENTER IF YOU DARE

**Everyone's heard a software project story and let's face it most organisations aren't on their first ERP, CMMS or Service Management system.**

**If you are literally sh\*\*ting it, because you know how easily you could get it all wrong, DON'T FEAR.**

**Here we share the typical implementation HORROR STORIES we hear all too often, so you know the common pitfalls and how to avoid them.**

If you have a short attention span the number one thing to remember is: Implementation Methodology - how you implement is key

Sounds fancy, but if all you do is ask your potential provider about their Implementation Methodology then you should find out how they manage all the important points including:

- Fully understanding your pain points.
- Knowing your core processes.
- Listening to all the key decision makers and influencers.
- Demonstrating the requirements as well as all the flashy new tech you may or may not need.
- Documenting what success looks like and demonstrating a simple and realistic ROI.
- Managing adequate resourcing in their team and yours, being clear what is needed when.
- Planning for a pilot to a full roll-out and training.
- Understanding what your ongoing roadmap looks like in terms of support, releases and upgrades.

But don't fool yourself, finding a good supplier with a proven Implementation Methodology and approach is only half of the battle.

Like any successful relationship, YOU HAVE TO MEET THEM HALFWAY.

**So, we could just boringly tell you about how to get implementation right, instead we will explain this by showing you what most commonly goes wrong. Who doesn't love a good horror story...**

# When do you want the new system?

# YESTERDAY

## Quick & Dirty

Be wary of skipping the scoping stage. For every business there are key requirements the system must deliver.

You really don't want to be the person who ASSUMED the service management system would fulfil your basic requirements without checking.

How stupid will you look when you realise your new system can't do something basic such as Scheduling PPM visits, which, for some service businesses could easily be 90% of their requirements.

### Do you want to look stupid?

No matter how slick your text alert system is to let customers know the engineer is on the way – if your system won't improve your most important and administration intensive activities then all the bells and whistles won't make up for it and you will end up looking stupid.

### To assume (ASS U ME) is to make an ass out of you and me.

If you make assumptions there will be major consequences, wasted implementation time, wasted budget and a loss of trust in your judgement. Because, when you implement a new system, you effect so many people across the organisation – there's nowhere to hide.

So always:

- Document your requirements in advance
- Ensure your demo shows you these activities in action
- Include the key service owners to check the process workflow in the new system
- Be clear on what's a necessary feature and what's a "nice to have"

### REMEMBER: Quick & Dirty = Fast & Stupid

We regularly speak to businesses with a system less than a year old – and every time it's the same. They skipped scoping and proper demos based on their requirements and no surprise, less than 12 months on, the business needs to repeat the exercise but hopefully not the same mistakes.

# Beauty is in the eye of the beholder

## It takes two to get it right

Every service management system has its cool features. A demo is necessary because you can quickly get an overview of the basic software capability and learn about your potential provider. However, you should always ensure you go through the full scoping stage – including sharing your pain points. Then go back for a second demo – a real demonstration of the stuff you really need and the features that will resolve your pain points. Because otherwise you are just buying based on looks and we all know it's what's inside that counts.

This might all sound obvious, but you would be surprised how many companies do this. They love a good demonstration, get swept away with an array of customer logos of companies they aspire to be like, and some clever features they may or may not need and they miss the obvious. Will this service management system make our lives easier?

## There's no beauty without pain

If your supplier doesn't ask about your pain points or they don't listen to the problems you face in your organisation then how can they really assure you that their system will help?

The beauty parade process is most often the route to stalled projects. Because without clear requirements, an understanding of what success looks like, (never mind a clear ROI), then after the parade is finished and the purchase order request is sat in your inbox waiting for approval, you just won't be able to justify the spend. And who could blame you. Needless to say, you will have wasted a lot of time and money whilst making no progress whatsoever!

## Share your pain

So, book the demo's but also share your pain. Only then can you see the solutions that can enhance your business, so you can confidently issue a purchase order because you know improvements can be delivered.

Lastly don't forget you are also getting into bed with the supplier.

So don't be dazzled by a beautiful Business Development team. Instead check out supplier credentials and consider:

- How long have they been doing this?
- Can they provide customer references?
- What's does their support service include?
- What is their roadmap for planned improvements (releases) and when are the next upgrades planned?



# Senior Managers Only!

(Oh how foolish this tactic can be...)

## Simply put, when was the last time a Senior Manager walked a day in the life of the people in their teams?

When was the last time they actually executed a departmental process from end to end? How well do they really know the processes and the way your existing system and operations actually work?

If your Senior Managers know the day-to-day processes backwards then you're in the 1% minority – because face facts, Senior Managers generally don't do the day to day.

### Exclude key players at your peril

Because they will be involved in the implementation at some point and how stupid will you feel when they point out any basic stuff you have missed?!

Involve them early and you get their buy-in, their knowledge and contribution and they become part of making implementation a success.

Instead, make your life easier:

Identify key stakeholders – not just decision makers.

- Engage all key stakeholders i.e. a service controller, who can help determine the success or failure of the project.
- Get them to document what they do and the problems they face
- Ask them what they think
- Get them involved in the demonstrations of improvements, testing and roll-out

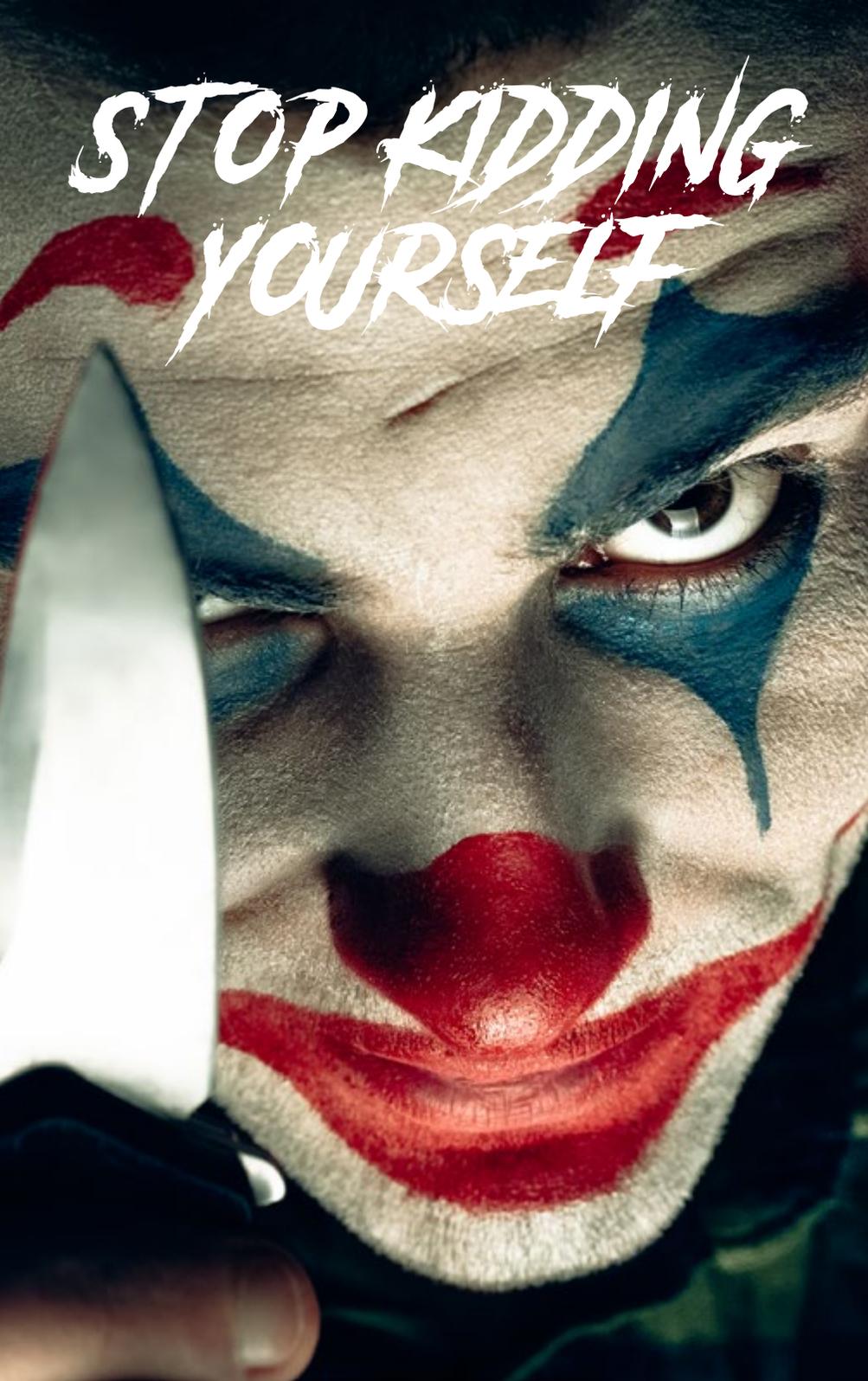
### When?

#### The earlier the better

To be clear, selecting a supplier without stakeholder input, thinking you can involve them later, will mean you are likely signing up for a system that just won't deliver the best solution for you.

#### No surprise

We've stopped being surprised that Senior Managers believe they can and indeed, 'should', do this on their own. Instead we find just a few key questions, helps them identify the stakeholders we need to talk to. Then we smile when we see the relief on their faces when the stakeholders fully answer the questions and they can start to see how the system can be implemented to really improve their operation.



# STOP KIDDING YOURSELF

## **If you don't document what success looks like for your field or service management system, then you are kidding yourself that you might actually be successful!**

Picture this: it's 6-months after go-live and you're presenting back to the board. Can you remember what the business pain points were 12 – 18 months ago?

If you don't document the successes you are looking for from the outset then you risk:

- Failing to get the right things in the scope
- Forgetting to focus on the success points in the training
- Not measuring the right things from the start to be able to show your improvements

A clear picture of success gives you and your software partner a common goal.

Setting a target "we've got to reduce X by Z within 6 months of go-live" can all too easily become forgotten when you're focusing on implementation and even more likely once the go-live has been implemented and you're left to your own devices. But be warned, you will still need to show improvements. You just won't know where to start and if you've failed to focus on some short term deliverables it's likely you won't have the data to show what a difference you've made.

# Fail to plan: Plan to fail



**When it comes to company resources, honesty is the best policy.**

**You need resource for a good implementation.**

This is people in your team who already have busy day jobs being freed up to support a good implementation.

**Any supplier that says “it’s easy, the software is cloud based so you can trial it and then start to put your data in and then when you fully implement it, it’s a smooth transition” is just stretching the truth.**

Because the reality is most things still go-live on the same day with agreed opening balances and transition data.

Whilst you can test and play around with most systems beforehand, don’t underestimate the resource you will need and ask for a clear, phased implementation plan that shows your deliverables not just the software suppliers so you can get your resourcing right.

**Stop the moaning before it starts**

Saving you lots of moaning along the way. Because why would you want the first impression for key users to be a complaint about just how much time this is taking. Better to be honest, plan resourcing, and ensure an on-time and smooth delivery.



STOP!

## If you don't know what you want your return on investment (ROI) should be.

**How can you possibly sign off £150k of spend without being able to quantify what you will get for it?**

Always endeavour to quantify the investment in pounds and pence. If you've avoided the other common pitfalls then by the time you come to sign off your software implementation you should have as a minimum:

- A clear, detailed scope
- Resolution of pain points
- A target for measurable success
- Good resource and planning
- A CLEAR ROI

Because once you know what the improvements are, you can simply quantify them – making sign off easy.

**Fail to do the ROI calculation and once the demo has ended and the purchase order awaits your sign off, you'll be shi\*\*ing it.**



# Service Geeni

[servicegeeni.com](http://servicegeeni.com) | 0330 088 0802

