Industrial SMEs and SMBs:

How do you get your teams on board when installing SaaS software?

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Integrating new software into a company is a strategic step, often synonymous with modernizing processes and improving productivity. This transition can also give rise to apprehension and resistance within teams.

This white paper is intended as a practical guide to effectively getting teams on board when installing SaaS software. Emphasizing the importance of communication and collaboration, we look at best practices for ensuring a smooth and successful transition to the new software solution.

Whether you're an IT manager, a project manager or a member of a user team, this white paper offers invaluable advice on how to make the transition a success.

Creating a project team

Depending on the size of the company, the team may consist of one or more people. It's important to have business users on board, with an appetite for digital issues if possible.

The first step for this working group is to come up with a project name. Involve team members from the outset in the selection of the project name. This will give the group a sense of belonging, and help infuse the solution more effectively as it is rolled out across the company.

This project name should be communicated internally so that other company employees can quickly identify the project and understand its importance.

Collaborative construction of specifications

The presence of the solution's end users is paramount during deployment. They're the ones who'll:

- Define the points of hardship to be resolved. This is one of the guarantees that the software will be accepted by all.

- Define the operational need for the solution's functionalities

- Establish clear objectives, because without objectives, no project can be implemented in the company in a structured way.

Obtain management support

Objectives must be aligned with identified needs and the company's overall strategies. The DG's support for the project will encourage teams to become more involved. It will also enable the project to be prioritized in relation to other projects launched by the company.

It is also management that will provide the resources needed to complete the project: human, material and... budgetary! The budget allocated will be decisive in the choice of solution.

Supplier selection

The choice of supplier is critical. It's important to ensure that the solution meets users' needs (use at the workstation, functionality, ergonomics, etc.).

A demonstration of the solution by suppliers in as real a setting as possible will help choose the most suitable solution for the working environment. Each supplier offers different solutions, and end-user involvement is essential.

For a collective, unbiased assessment of the solution, use a predefined evaluation grid, which will give each supplier an overall score and enable you to make a quick, objective decision.

Of course, the final decision will depend on user feedback, the time required to deploy the solution and, above all, the budget defined by the company.

Training with targets for instant gains

First and foremost, we need one or two people in the company to be responsible for the application. These are the people who will be able to support and guide software users.

As a matter of priority, these referents should be trained on subjects that will enable them to resolve the most "painful" points of hardship very easily. A few quick wins at the start of training will help to motivate them to get to the heart of the matter.

Next, you need to train users according to their needs: if you train end-users on a feature that meets one of their needs, they will be able to use the solution directly.

Incite them to go beyond training.

Installation, testing and tuning

Gathering feedback and recommendations from end-users, draw up a preferred scenario describing the key stages in deploying the solution.

Test the scenario on a small perimeter of the company's activities. By identifying key performance indicators, you'll be able to assess the tool's effectiveness and its impact on the company's various divisions.

This will enable any problems or obstacles encountered to be detected and resolved quickly, limiting the risks associated with large-scale deployment.

Grow the solution over time: Test and adjust the scenario as you go along, based on feedback and changing needs.

The tips'olome: Plan checkpoints according to tool complexity and transition period. Think of it as ongoing training to assess everyone's use of the tool and understanding of its features.

Organize a launch event

In collaboration with internal teams and the supplier, set a date and place to officially launch the use of the solution.

Clearly communicate the event program, making sure that everyone involved has received/read the invitations (e.g. a poster in a break room isn't enough).

Organize demonstrations of the solution. This allows participants to discover its features and benefits. Encourage participants to ask questions and exchange ideas.

After the event, be sure to gather feedback from participants and assess the impact of the event on their commitment and understanding of the project.
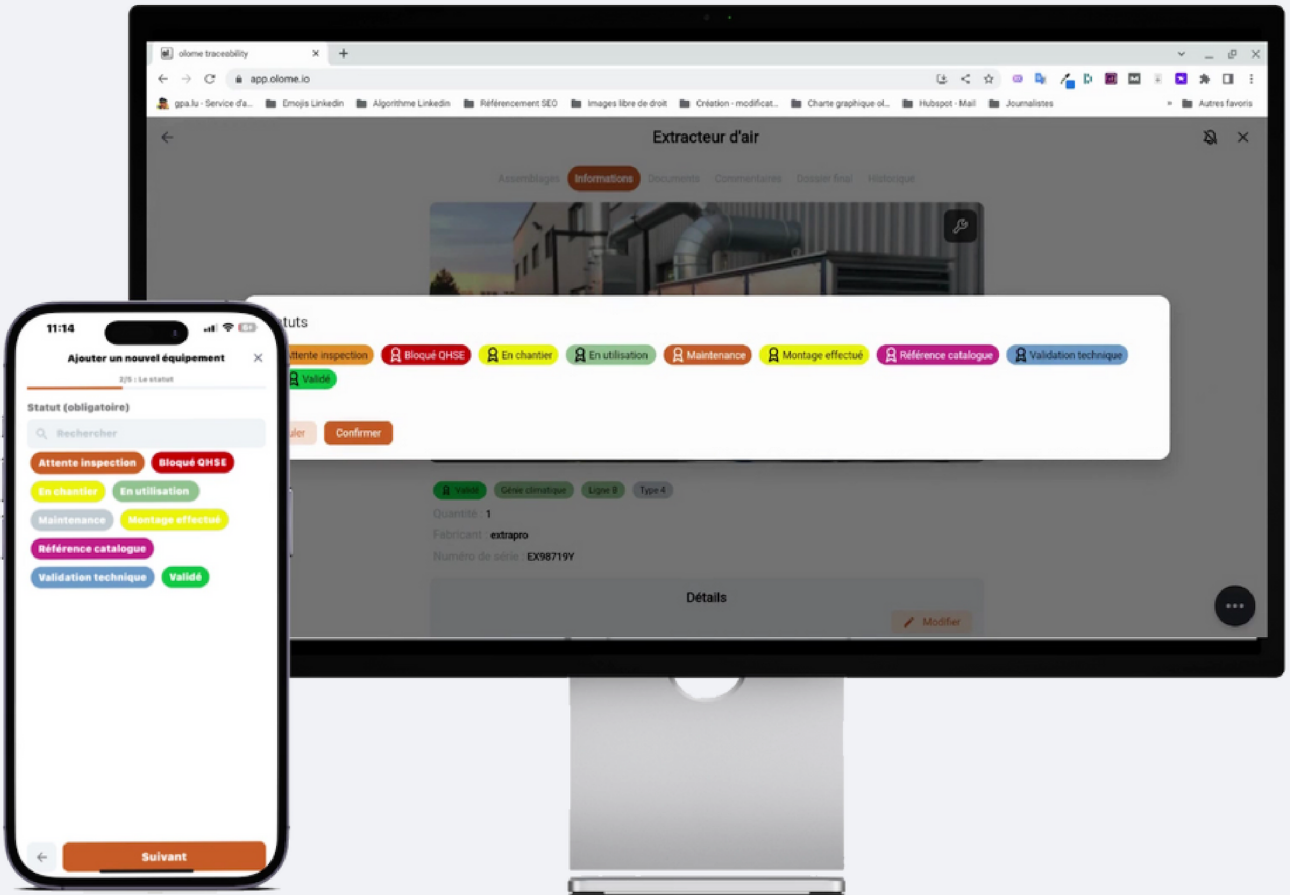
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