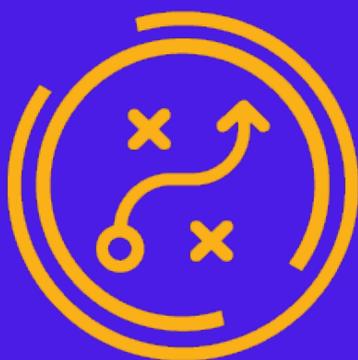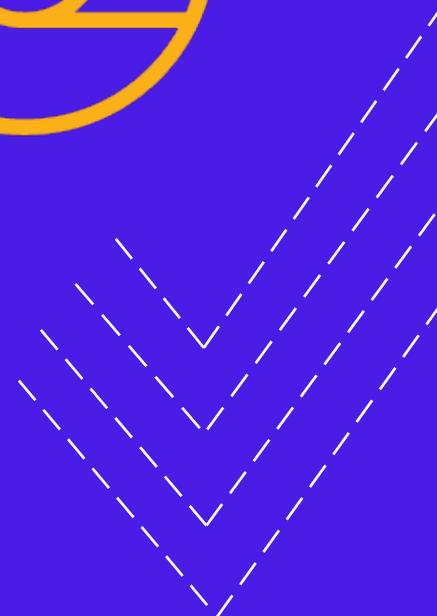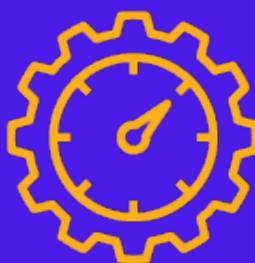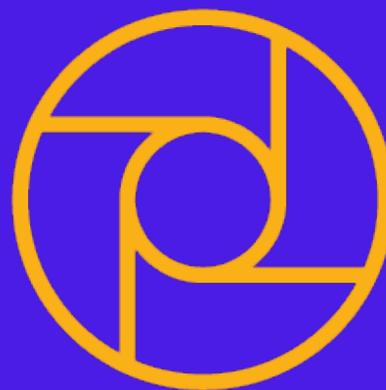# Six Best Practices for a a Successful SaaS Implementation

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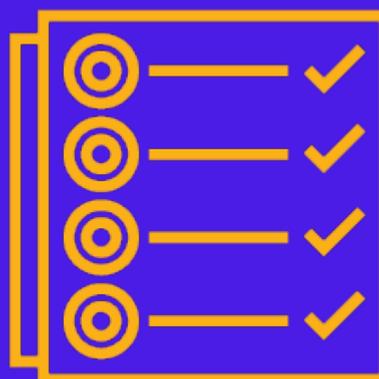
There are countless ways to fail in technology implementation, so even the best-laid plans of mice and men can go awry. Adhering to a project management philosophy is a great way to stay on course and promote clear understanding from start to finish. And though failure can come in many forms, success, more often than not, depends on the proper execution of a well-supported project management philosophy. For different teams, there are different styles, but there are a few key factors that remain ubiquitous no matter the industry.

These are:

Clearly defined objectives

Alignment of best practices

Focus on the project plan

Understanding team capacity and capabilites

Strategic flexibility

Continuous reassessment

For tech implementation, these factors matter in order to gain control over projects being launched within the organization, especially when working with project teams who are new to software solutions. Organizing projects based upon these elements has been shown to have a variety of positive effects on pilot success. These findings have implications for both clients and Life.io. A client reported 100% extremely satisfied with project implementation when the operations team utilized these practices.

Overall, the factors demonstrate increased effectiveness to launch – regardless of the project's complexity. By first establishing all deliverables and aligning key stakeholders on project goals and timeline during kick off, teams are saving themselves inefficiencies and unforeseen errors that may arise from "free form" planning.

CLEARLY DEFINED OBJECTIVES

Project success depends on collaboration and coordination internally and externally. Surprising though it may be, many projects fail before they even begin for one simple reason: failure to clearly define project objectives. When teams understand and agree to a clear set of project objectives, it allows them to align their efforts effectively. Objectives, or the reasons for beginning a project, serve as the foundation for planning. When intentions are unclear or become fluid, projects will quickly break down and frustrations will build for all teams involved. This is often the result of multiple stakeholders who are all trying to achieve highly varied objectives through the same project. To help internal teams, the client must identify all stakeholders, as well as outline their expectations, as this helps to maintain a clear understanding of deliverables due to all parties.

So, though it may seem as though we are stating the obvious for many readers, you cannot undervalue knowing clearly where you are trying to get to before the ship sets sail. Sit down with your team and clearly state the intentions of a project, and its stakeholders, to allow room for questions and clarity. By taking this precautionary step, your team will be off to an efficient and effective implementation.

FOCUS ON THE PROJECT PLAN

With clearly defined objectives, the project plan can begin to take shape. The process of outlining a success strategy for large enterprise clients requires the implementation team to rely on project management insights, knowledge gained from continuous assessments, and day-to-day experiences. These observations create space for teams to harness internal and external strengths, as well as identify areas for improvement.

Initial preparations also involve developing a client book that properly documents all communication, decisions, deliverables, meetings, and presentations. The book serves as a useful reference source whenever concerns arise and also helps in guiding new project team members.

By constantly evaluating the state of a project, the implementation team has the ability to re-evaluate the objectives and short-term goals, avoiding red flags by tagging errors early on, and continuing to support the long-term objectives. Following the game plan will keep individuals from being overwhelmed, ensure that goals are accomplished, and deliver quality service to clients.

STRATEGIC FLEXIBILITY

The ability to exercise strategic flexibility is crucial to success in the enterprise software market. Exercising strategic flexibility necessitates a clear understanding in where to flex in relation to industry trends and technological advances. Strategic flexibility must also constantly take into consideration client needs and preferences. This does not mean objectives are flexible. If your objectives change, the project must as well.

Akhtar and Mittal (2014) describe strategic flexibility as a quality that relates to the capacity of managerial capabilities, as well as speed of application that aims to enhance managerial control capacity and improve control of the company.[1] Strategic flexibility allows teams to deal with changes triggered by forces in the external environment and make the necessary changes that allow for adaption. This involves a constant re-evaluation of team strategies, including investment decisions and deployment of assets. In particular, strategic flexibility that relates to SaaS organizations must emphasize transparency of data, compatibility, connectivity, functionality, and technical skills, all of which assure higher efficiency in technology management. The impact of strategic flexibility is more evident in large companies and those operating in rapidly changing environments; however, the skills needed to be operationally flexible are equally important to teams of all sizes.

ALIGNMENT OF BEST PRACTICES

Alignment on best practices is paramount. Not all best practices are going to fit each project or client. Best practices are tried-and-tested methods to achieve the desired outcomes. Each project has a unique set of problems; experienced teams understand this and learn to handle them in the appropriate time and place. The experience gained from research and best practices leads to smoother processes, enhanced client relationships, and better pilot launches.

For example, Salapatas with the Project Management Institute, deemed "planned commitments" as a best practice of project management.[2] According to this finding, Life.io created a meeting cadence to guide the implementation schedule. Each meeting includes a meeting goal, agenda, detailed information of topics and key decisions to be made, deliverable review, meeting cadence review, and meeting closure to confirm whether the goal was achieved or not.

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UNDERSTANDING TEAM CAPACITY AND CAPABILITIES

Understanding the capabilities and capacity of your team is a key priority for organizational leadership. It is vital for the manager to know how long a task takes to complete, current workload, and a thorough understanding of competing priorities. A leader who continues to add work without considering a team's capacity increases burnout and decreases employee retention.

A leader's ability to understand the skill sets of team members is imperative for successful execution. The team leader needs to know whether individuals can complete their work using prior knowledge and experience; or, if they need to plan time for learning and problem solving. It is imperative to know when to push boundaries to move past status quo and when it is appropriate to challenge team members. By knowing your own team's limits, leaders can work collaboratively with clients to delegate and distribute workloads to maximize productivity based upon capacity, skills and abilities.

CONTINUOUS REASSESSMENT

There is a strong link between reassessment and success. Team should challenge themselves to assess progress throughout implementation by reviewing the deliverables, meeting goals, and meeting cadence at the end of each meeting. At the project conclusion, it's important to have internal and external evaluation. Internally, the wider teams should host a meeting to discuss what went wrong, what went right, and why, to ensure that the next project will have the foundation of quality improvement. Externally, a designated employee should solicit feedback about the implementation process and experience working with the company. Feedback will help internal teams learn more about why the client may or may not be satisfied based on an honest and productive criticism of the team's own professionalism, leadership, and quality output. The above activities create ways for teams to revisit strategic objectives, make progress on KPIs, confirm decisions align with the vision, address concerns, issues, and implement project modifications.

The project management philosophy espouses principles that, when applied properly, increase the likelihood of positive outcomes for the beginning, middle and end of project deliverables. A project must be clearly defined, goals and objectives clearly communicated, and reinforced throughout the life-span of the project. This helps to keep the project vision clear in the mindset, playing a critical role in determining the success of projects. While leadership plays a part in steering projects towards the attainment of set objectives, it is equally vital that all project members are accountable to their roles and record progress, as this promotes ownership and transparency throughout the project.

The strategies proposed to achieve success in SaaS with large enterprise clients emphasize the key themes to project management philosophy. By paying close attention to these themes and properly applying project management principles, achieving success is more of a certainty than an elusive dream for SaaS with large enterprise clients.

ABOUT LIFE.IO

Life.io is a leading customer engagement and data analytics solution bridging the gap between life carriers and their policyholders. By helping people achieve their goals, Life.io enables carriers to become human again, achieving their promise to help people live healthier, happier lives, while providing them with security and trust. Built on a foundation of science, Life.io uses behavioral economics, social psychology, and personalized content to nurture a community of highly engaged consumers. By utilizing Life.io, carriers capture these insights and use them to build brand loyalty, accelerate growth, minimize policy risk, and streamline the underwriting process.

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3. Molyneaux, I. (2015). The art of application performance testing: from strategy to tools. Sebastopol, CA: O'Reilly.

4. Salapatas, J. N. (2000). Best practices—the nine elements to success. Paper presented at Project Management Institute Annual Seminars & Symposium, Houston, TX. Newtown Square, PA: Project Management Institute.

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