SaaS Implementations – What is Expected of Your Customer Team?

Now that you have made the decision that a SaaS software system is right for your company, you are faced with understanding what is expected of your resources in the SaaS implementation model. If you are new to SaaS, how do you identify resources to fill the gaps between what a typical SaaS provider brings and what is really needed for a complete implementation? The answer lies in the specific needs you have as a company, in the available resources and skills that your company can bring to the table, and the timing of your implementation. Your company champions may have experience with more typical on-premise ERP implementations but need to be aware of the differences in common SaaS implementation models. The list below is based on the Govett Consulting, LLC latest experience with two prominent SaaS packages: Plex Online and SAP ByDesign.

Limited Onsite Consultant Presence

One of the great things about SaaS is the ability to access your solution anywhere, anytime. Since your SaaS provider's consultants have the same ability, remote support is the norm. SaaS consultants may spend time onsite for certain all-day type of activities (initial business process discovery, workshops, key walkthroughs or pilots, and final implementation), but the majority of the support you receive during the implementation will be remote. Web-based sessions and training are widely used. Make sure you get the complete scope of what is typical from your provider. One of my clients determined that they needed more onsite presence in a certain complex area and arranged that upfront. It turned out to be a great decision as the usual provider estimates in this area were indeed not enough.

Shared Consultant Model

A big change from the on-premise model is the shared consultant model. In order for providers to make money in an on-demand model, most consultants are typically working 2-3 implementation projects. What this means to you is there can be limitations to answering urgent requests, working through something that "just came up", etc. The providers should be used to these concerns and have methodology and tools in place to handle issues, emergencies and urgent requests – just make sure you discuss this process up front so you know what to expect.

The "Self Enablement or Go Fishing" Concept

After initial training you will start hearing from the consultant that you need to "Look at the Help Center" or "Investigate this Wiki". This is the process of self enablement – it forces the team member to try and find the solution rather than just lean across the aisle to ask Joe Consultant. It is great that it fosters learning, but be prepared for the push back to learn versus just answer your question – it can be frustrating for a team member who knows he/she must spend hours looking vs. getting a quick answer with a call or email.

Customer Project Management

Another difference between onsite and SaaS is that the SaaS provider's project manager typically spends much less time onsite. So even though we always had a customer PM even in onsite ERP implementations, the SaaS model places even greater responsibility on the customer PM to ensure team tasks are accomplished, to solve team issues, and (the tricky one) to make sure team members are doing their self enablement tasks or homework.

Data Migration

This has always been a major undertaking and one of the most overlooked areas of ERP implementation. In the typical onsite model, the customer has always had the majority of the work but usually had an on-site consultant to assist. In the SaaS model, the provider provides tools, templates, and guidance but the customer is responsible for this very important task. Make sure you thoroughly understand the methodology, tools, and skill set expectations when evaluating your SaaS software. It is critical to get this right – many implementations falter due to data migration challenges. In our recent experience with both Plex and SAP ByDesign, both customers had us take the primary role in executing the data migration effort because they felt they did not have the experience, skills, or the bandwidth to dedicate to this critical task.

Testing

Your SaaS provider will equip you with templates and guidance for testing, but the primary responsibility to develop and execute the test plans falls on the customer shoulders. The providers make sure support is always there to answer questions and solve issues during this phase, but the usual expectation is that the customer will lead the effort.

The Bottom Line

Executives are falling in love with the reduced cost of SaaS implementations. However, the work that used to be done by the ERP provider's onsite consultants still has to get done. Executives need to realize how the responsibility has shifted and the resulting impact to their organization. Significant emphasis has always been placed on having the appropriate and available customer resources for an ERP implementation team. However, with the self-enablement SaaS model, there no longer are onsite consultant(s) to catch up or rescue the customer team. It is your typical Catch 22 – it is fantastic that more responsibility and knowledge are being gained by the users, as that greatly increases the chance for a successful implementation. However, if the work does not get done in a timely manner, it can drastically impact the implementation timeline and cost.

Customers are embracing the big benefits of the SaaS implementation model as it definitely can build a very educated and knowledgeable ERP team with lower reliance on consultants – but make sure you spend plenty of time upfront discussing exactly what is expected of your team so they can have that successful "Go Live" party!!

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This paper was prepared by Govett Consulting, LLC, based out of Austin, Texas. Our target clients are looking for senior consultants to wear "multiple hats" while working with their team bringing ERP knowledge and experienced implementation expertise. Learn more at www.govettconsulting.com