

# The Secret to a Successful Software Implementation

The idea of using new software to ease process congestion and improve experiences is exciting. But there's usually one big hurdle to get through: the actual deployment of the solution.

In truth, the real secret to successfully implementing software isn't the technology—it's alignment, communication, and adoption. Below is a checklist of the steps you can take to ensure you seamlessly implement and adopt the best technology for your institution.

## Step 1: Prepare for Implementation Planning

- Connect with your Project Manager or Sales Representative to discuss an implementation planning call
- Collaborate with your technology partner and set realistic expectations and timelines
- Set key check-in milestones
- Gather initial information for the implementation process
- Collect any deliverables requested by your technology partner
- Communicate internally about which software was selected
- Define implementation goals, scope of work, and success metrics
- Identify potential risks or challenges early on

## Step 2: Build the Project Team

- Determine which departments need representation on the implementation team
- Identify which departmental stakeholders will form the implementation team (be sure to include product or subject matter experts)
- Assign an internal project owner
- Define roles on the team, including clear delineations between "decision-makers" and "contributors"

## Step 3: Establish Communication Standards

- Set up the cadence for recurring meetings
- Determine how best to share and communicate information
- Share contact lists and establish emergency protocols
- Define escalation points and issue-resolution processes
- Agree on documentation standards and establish a single source of truth
- Define the approval process



## Step 4: Kick Off the Project

- Review implementation goals and success criteria
- Confirm timelines and responsibilities
- Discuss software configuration and setup
- Participate in data conversion orientation/training
- Review ideal business processes
- Begin data validation

## Step 5: Prepare for Go-Live

- Finalize data validation
- Test data readiness
- Train teams and validate end-user readiness
- Confirm support processes
- Conduct user acceptance training (UAT)
- Finalize implementation checklist and rollback plan

## Step 6: Go Live and Plan for the Future

- Go live
- Leverage product training resources (in-person, live, on-demand, or virtual training)
- Monitor system performance and user adoption
- Conduct a post-implementation review
- Participate in client communities, attend user conferences, and connect with users
- Continuously plan for optimization and enhancements

The right technology can unlock new efficiencies, cost savings, and processes—but its implementation is critical. In today's world, success relies heavily on deploying solutions on time and on budget. This checklist can help institutions build a framework for system implementations, but the best way forward is to work with a proven partner.

With more than 40 years of experience, Jenzabar has a long track record for supporting on-time, on-budget implementations. We help large and small campuses find, adopt, and employ systems that enable long-term institutional success. With Jenzabar, you can put to rest the fears associated with delayed and costly solution implementations and instead focus on pursuing new opportunities for growth.

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