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One of the most feared projects for companies is changing organization-wide technology solutions. There are countless scenarios to consider, from ensuring that no technical snags could derail the project when it goes live to making everyone aware of the change and effectively trained.

Apply the five best practices as a blueprint to implement any organization-wide technology migration effectively.

1

Review business processes

Companies often need to keep their business processes updated, not because they want to but because changing them can cause disruption. Hence, it's easier to maintain the status quo. To ensure a smooth changeover, developing an effective migration plan is important. Before making a move, review your back-end and internal processes. Be sure to delete old rules, remove unused general ledger codes, and improve rule descriptions to make things flow more smoothly.



2

Keep end-users in the loop

People resist change, even if it makes their life easier. Blindsiding them with a big change can lead to frustration. Therefore, you need to give people time to adapt and absorb the news of the impending change.

Communicate the change to users at least one month before. Users will appreciate the lead time to get used to the change and ask questions. The lead-up to rollout also provides an opportunity to get buy-in. Point out the great benefits of the new platform and get users excited about upcoming changes.





Test and validate the system

Before implementing any changes to your business processes, testing and validating the rules is crucial to avoid deploying incorrect procedures. This requires thorough checking of all modified rules and system conditions. During testing, it is essential to uncover and address significant issues to guarantee seamless flow and ensure the proper functioning of the new processes.



Make adoption easy for everyone

To make the change easy, it's critical to make it easy for your users. Start by creating clearly-written, step-by-step instructions for users and making sure they are readily available. For example, you can link the instructions on the Emburse solution system home page so users can see it each time they log on. Remember, some users may open the solution for the first time or only log on a few times a year if they don't need to use the system regularly.

Pressure test the instructions with different user types, like those who access the system regularly, those who only access it infrequently, and those who have never used it before, to see how they all respond. The training material should be fundamental but also cover the different variables. If possible, provide live training and video tutorials on your company's intranet site or newsletter.



5

Implement in phases

(if needed)

The employee communications process must set a clear deadline for the old system to turn off. However, it can be easier for larger organizations to move teams over in waves over a couple of weeks, either by geographical location or by department, which may make training and internal user support easier to execute. Keeping the old system “open” briefly is also an option so users can catch up on training.

While a technology migration may look daunting at the outset, if you create an effective plan, there is no reason it should cause any major headaches. And as always, Emburse is here to help make the process run smoothly.



About Emburse

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“ Emburse has changed our company culture in regards to expense submission and management. ”

Athena Gazikas

Finance Manager, International Services, Inc.