# Who Should Be Involved in Your Enterprise Software Selection Process?

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It's often said that people are the most important resource of a company. The same can be said for any large process or project that a company goes through, and is indeed true for the enterprise software selection process. Having the right people on board from the beginning can contribute more to the success of a software selection initiative than almost any other criteria, says Denis Rousseau, senior business systems analyst at TEC.

Rousseau has identified three key people or groups to have in place when starting the enterprise software selection process:

1. A sponsor, from a level of management that covers all affected areas of the organization
2. A dedicated project manager who will coordinate and drive the process
3. Knowledgeable internal stakeholders who can contribute and be involved in the evaluation and selection

Let's take a look at these groups in more detail, including the specific characteristics of these people.

## A Sponsor

Every software selection project needs a sponsor. This is an individual who was involved in the business case and the decision to purchase a new or upgraded software system, and can champion the process.

The sponsor should come from the level of management that has influence over all the areas of the organization that will be involved with the business processes supported by the new system. This may be the CEO or another C-level executive if the solution is to be used to standardize business processes throughout a smaller company. Or it may be the head of a specific division or department of a larger organization if the solution will involve the operations of just that division or department.

The sponsor will add visible support to the selection process, and can help to work out any department-level or higher issues that arise. A new software system is such a disruptive change for an organization that clear high-level sponsorship is vital.

# A Project Manager

The software selection decision is one of the most important decisions that your company will ever make, and it deserves a dedicated manager to oversee the process from start to finish and coordinate the people and steps involved. The project manager for the selection project can come from within the organization or can be brought in from the outside specifically for this endeavor.

The project manager is responsible for ensuring that the appropriate people and resources are identified and assigned to the different phases of the project, and that tasks are coordinated to ensure a smooth progression of the selection process. This individual can therefore drive the specific steps and phases of the project to ensure that the project proceeds according to plan, major milestones are achieved as anticipated, and any emerging issues are promptly addressed. Ideally, the selection project manager should also be responsible for managing the implementation, as the software selection process sets the basis for implementation success.

# Internal Stakeholders

Internal stakeholders are another category of people important to the enterprise software selection process. Participants from each department or area involved with the new system need to be brought on board at the start of the selection project, and ideally these stakeholders will meet most of the following characteristics.

First you want to find the people in your company who are *subject matter experts (SMEs)*— knowledgeable people who have a deep understanding of how the business works in their area and how it relates to other areas of the company. For example, the person in charge of accounts payable may also be familiar with the overall accounting and financial practices at the company.

With their specific expertise in relevant company processes, these stakeholders play a key role in defining the requirements of the system in the requirements gathering phase. This knowledge will be useful when it comes time to decide what software functionality is needed to support the specific business processes applicable to their area. What's important here is the ability to see beyond the day-to-day tasks of the area and discover opportunities for improvement during requirements gathering and throughout the selection initiative.

Your SMEs are a rare and valued bunch, as they must both understand abstraction at the business level and be able to see how their area of expertise fits into the whole picture. When it comes time for the implementation, they will also be able to answer the inevitable tough questions from the implementer.

Second, the internal stakeholders should be *opinion leaders*. These are people who have a certain standing within their department or group, and who have already garnered the respect of those around them. When the final software selection decision is made, having had the buy-in from these opinion leaders in the final selection will smooth the acceptance process greatly, and minimize resistance to the decision to purchase and implement a new system. For example, the new system may generate extra work that does not provide value within a specific department but is needed by the overall system. This must be explained and justified so as to persuade reluctant users that the change is needed and will benefit the department overall.

Third, the stakeholders should be candidates for becoming *key users*.

The selection is only one step in the process of acquiring a new system. When identifying people to become stakeholders, you should look forward and consider who is going to be involved with the system once it is up and running. Key users have a critical role to play during both the implementation and operation phases. During the implementation, they will define the system parameters and requirements, document them, and eventually train other users within their area. Once the system is in operation within the company, these stakeholders become *power users* who know the system very well and function as a resource, providing support for others within their area.

When considering candidates for the role of stakeholder, try to cast a wide net. A key user may be someone who has been at the company for 20 years and has gained in-depth knowledge of how his or her department functions and has changed over the years, and can therefore see how the system may be able to accommodate future anticipated changes to the department. Or it may be a young employee just out of university who understands the theoretical framework of his or her area of expertise and can envisage major improvements to the department's functioning with a new software system, such as automation of time-consuming or routine tasks, freeing up resources to address more important departmental issues.

## Yes, You Really Do Need All These People!

This may seem like a lot of people to have involved in the selection process, but putting time into getting the right people on board at the beginning will save on effort in the long run. With people involved from the start who know the processes, know the business, are directly involved with the system, and have a high standing in their respective areas, as well as a high-level sponsor and a dedicated project manager, you're setting the stage for a successful and smooth selection project and eventual implementation.

But if you just dump a system on your organization without proper prior research, input, and buy-in from influential people, this is a recipe for disaster, with the likely outcome being a problematic and time-consuming implementation of a system that doesn't even do what you need it to.

Courage is needed to identify and assign the best people for the job. Often their value is obvious in the day-to-day, and seconding them for the system acquisition may seem counterproductive, but in reality, this is crucial for the success of the selection project.

## Related Reading

3 Mantras for Starting Your Software Selection Project on the Right Foot. April 24, 2015.
First Steps for Software Selection Success. April 14, 2015.

Denis Rousseau is a multilingual planning consultant and business systems analyst with extensive international experience. Over the past 25 years, he has used planning, project management, systems analysis, and group dynamics to define project start-ups and to troubleshoot difficult situations in order to put projects back on track.

Rousseau is the former senior project management consultant for CANARAIL and Canadian Pacific Consulting Services, two internationally recognized railway consulting firms. In a similar position for Canadian Pacific Limited, the parent company of CP Rail, his experience has covered a wide variety of projects.

He holds a BS in psychology from l'Université de Montréal, Canada, and was educated in Mexico, Lebanon, Argentina, Canada, and France.

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