

How to Crush Your SaaS Implementations

A guide to
managing
the most
critical phases
in B2B
onboarding

BATON



Introduction

The SaaS market is fragmented, with tens of thousands of providers servicing literally thousands of different types of customers, each with unique onboarding requirements.

Obviously, there is no such thing as a single, step-by-step implementation process or path for all.

However, if a SaaS provider focuses on developing a more flexible implementation framework—the collaborative sequence common to most projects—and places those tasks within a dynamic, real-time project management portal that’s easy to access, their onboarding experts will know exactly where each project stands at any given moment.

Further, they will be able to leverage historical data automatically archived at the conclusion of prior projects to develop new business habits that improve subsequent onboarding processes, further reducing delays and implementation timeframes.

An online portal, therefore, can help you monitor and gradually enhance your implementation “hygiene,” allowing your onboarding experts to complete more projects in significantly less time.

As the implementation process improves, revenue growth remains on the upswing and is more likely to accelerate. And, most importantly, because the software becomes easier to deploy, customers are more likely to stay with the provider longer and churn rates decline.

In this guide, you will learn how to step up your team’s implementation game by leveraging a project management platform, and why this is critical to driving real, measurable results. Regardless of size, your SaaS onboarding team can benefit from the strategic wisdom shared in this guide.



Why should you improve your implementation process in the first place?

Onboarding is where it all gets real. Really fast.

The world of SaaS is complex, and your delivery teams are the first to adapt to the customer and your company's needs. The best way to help that difficult transition along is to establish impeccable product delivery hygiene right at the outset.

A successful implementation means the customer's initial objectives have been met. Treating the customer as a trusted partner throughout and making their project priorities your project priorities ultimately results in a satisfactory, long-term customer relationship.

Statistically, a positive implementation experience protects your SaaS revenue two years down the road. Using your software to improve operations and increase the customer's revenue makes for a happy customer. That means your churn rate goes down while revenue streams go up.

Tick. Tick. Tick.

Swift and efficient onboarding is critical to your company's success. The best way for multiple collaborators to keep your projects on pace is to improve visibility throughout the entire delivery processes AND to capture all activity in a single system of record.

If all your information is saved and stored in disparate sources—such as spreadsheets and email chains—there is no easy way to learn from your mistakes, build upon prior deployment experience, and/or help leadership understand what's happening across your portfolio. In many early-stage companies implementation knowledge is stored in the mind of a single onboarding manager. From a long-term perspective, this or any other siloed approach is a major hindrance to your company's growth.



8 must-haves to create a scalable implementation program

Now that we've explored why the implementation process is so critical to your business, it's time to dig deeper with a point-by-point overview of how a winning implementation team operates—and how implementation project management software plays a key role in driving this success.

1. Employ an implementation framework with standardized playbooks

Clients view your implementation team as the experts who will guide them through the onboarding process. To build on that confidence and be viewed as the project's "voice of authority," you must establish a clear and consistent onboarding methodology.

Begin by developing a set of discrete digital playbooks—which contain templates with the primary components of your implementation process—for every type of customer you serve. Playbooks provide implementation project information that's visible, actionable, and predictable, thereby helping you launch on time, every time, and adhere to the project schedule, regardless of the client type.

With today's project management software, you can create detailed, step-by-step templates that illustrate exactly how and when each step of the deployment will unfold. This will drive consistency among your project managers and give the customer a clear view of the sequence of steps that must be executed to complete the onboarding on time.

Once your basic playbook documentation—processes, best practices, and workflows—is complete, you can begin to develop variations by client or industry type. This will allow you to incorporate, for example, specialized roles for your onboarding teams for certain types of clients.

Depending on your offering, you may even want to determine how projects are to be handled in regions or countries with differing regulatory/compliance requirements. Regardless of the circumstances, the ultimate goal is to continually make each implementation a little bit better than the one that preceded it.

2. Establish/outline individual roles

Playbooks also can be used to outline the role of each team player—including those on the client side—which helps them better understand their responsibilities and how critical they are to the project's success.

If possible, open the kick-off meeting with a Gantt chart so customers can quickly see that any delays in their deliverables will significantly delay the project overall. A Gantt chart will also help uncover any client-side conflicts in scheduling, milestone sequencing, or deliverables, right at the outset.

Next, detail what's expected/needed from each participant. Doing so improves project outcomes, enhances your implementation team's productivity, and creates a more satisfying work environment for everyone. You can also outline consultant and vendor roles, how they fit and when they'll be brought in. Net result: Everyone understands both their role and when they'll be called upon to act before the project begins.

3. Develop playbooks by customer type

As your company grows and its implementations become more sophisticated, you'll likely move into different industries with different onboarding needs. At this point, you can customize your playbooks and templates by customer type and/or industry, which allows you to plan for and ultimately improve the way you handle specific client-side issues.

For example, an onboarding sequence for a software company requiring one API connection and one data ingest will be dramatically different from an enterprise level offering that involves multiple integrations to numerous APYs and 20 data sources.

Or perhaps you find enterprise level User Acceptance Testing (UAT) usually creates a delay due to the sheer number of parties involved. It might make sense then to divide the next implementation's testing and approval processes into two separate UAT sessions. Having fewer individuals involved in each session could accelerate the overall approval process.

Establishing this level of detail in your implementation playbooks leads to project clarity because both project managers and customers alike know exactly what to expect, right at the outset. Further, you can track how similar projects differ and make changes to optimize future deliveries and further increase margins.

4. Embrace consistent and clear communications

An implementation, like any relationship, typically begins on a high note, with everyone excited and filled with hope. But things inevitably go wrong.

To maintain that initial client confidence—and your team's voice of authority—you must establish a consistent communications process right from the start. A weekly status report, presented on the same day and time, will allow all parties to see progress week over week, identify/discuss potential scheduling risks and enhance predictability.

Make “risks” a key part of the agenda. Ask, “Are there any risks we should note?” at every meeting. Making that part of your communications process means a small fire will be identified and extinguished long before it becomes an eight-alarm inferno.

A key client-side team member's upcoming vacation, for example, might be overlooked—but could delay an important approval if it's not identified and addressed early on. If there's a mid-project personnel change, your weekly status reports make for a seamless handoff. And dissatisfied client issues are more easily addressed and resolved when communications are automatically archived and available for reference.

5. Solicit customer KPIs

If an issue slips by and escalates, it could negatively impact your client-side counterparts internally. That, in turn, could undermine the trust and goodwill you've worked so hard to establish. It's critical, therefore, that customer-side implementation needs are also identified at the outset.

How will the customer measure success? How are the client-side project manager(s) being measured internally? What do their constituents expect? In some instances, budget will be paramount, while in others finishing the project before the internal Thanksgiving code freeze will be the top priority.

Identify these issues and build them into the schedule at the beginning of the project, not 10 weeks after you're underway.

6. Reliable predictability

A key advantage to using implementation management software is its audit capabilities—which allow you to review data from past projects to gradually improve your onboarding processes and establish specific deadlines you know can be made.

As your company grows and your onboardings become more sophisticated, it becomes increasingly important to accurately forecast when the client will go live. Upper management must be able to forecast headcount resources needed to handle the client implementation pipeline, including when and if partners need to be brought in, or subcontracted.

Rest assured, creating detailed playbooks/templates, outlining every team role, embracing regularly scheduled status meetings and incorporating customer KPIs will greatly enhance both predictability and client confidence.

7. Sales + delivery = success

Delivery teams that can clearly and concisely articulate a specific delivery path are often seen by their sales counterparts as valuable assets. Granted, there's an age-old tension between sales and delivery. Sales sells the dream and delivery makes it happen. But SaaS companies that perform well on both ends tend to encourage strong relationships between delivery and sales.

Think about it. The customer sees a proposed delivery date as possible because the steps are laid out in detail before them. As the successes mount, delivery teams are brought into sales cycles earlier and earlier because they help solidify the sales process.

That, in turn, benefits the delivery team because it has a much better handle on how many projects are in the pipeline, allowing them to forecast their staffing requirements more accurately.

Delivery teams also provide the company with more predictable revenues because they've mapped out both standard and non-standard delivery paths. This, in turn, supports more predictable revenue bookings, and overall recognition of revenue—both for sales compensation and recognizing services revenue attached to new client deals.

8. Meeting financial targets

Depending on the development stage of your company, the financial targets for your SaaS delivery team will likely change over time.

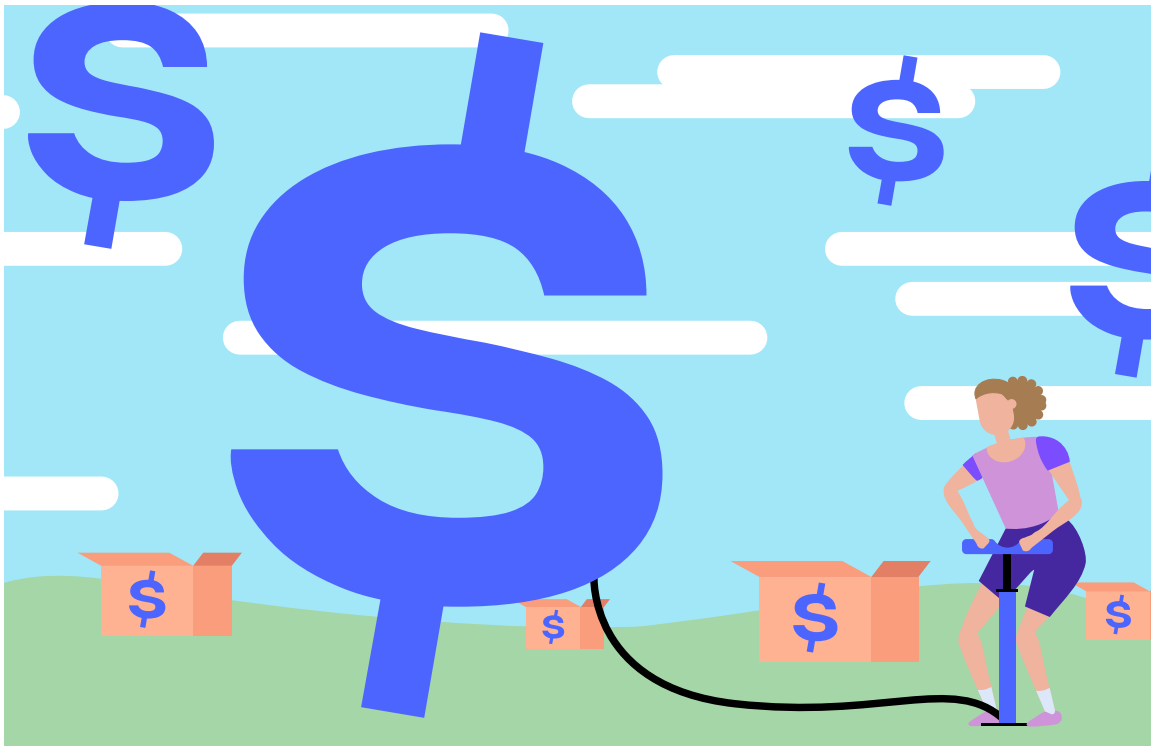
Series “A” software companies deploying technology for the first time simply want to get customers live ASAP—regardless of the costs—and build on their initial implementation experiences. As these companies mature, they begin to view the implementation team as a break-even function.

Eventually, however, SaaS companies establish specific margin targets for the department. At this stage, the implementation team may start tracking

utilization, on both an individual and team basis. They may develop quarterly financial targets, such as bookings (sale of services to be delivered in the future), revenue (actual work delivered in a quarter) and expenses (cost of the team and other expenses).

Also at this stage, companies may develop compensation programs where a specific part of an employee's pay is variable. Team leaders will need to decide what outcomes to incent and whether they are measurable or just qualitative. This is often a huge change for a team that had previously been focused solely on the customer experience. Now they need to track (and meet) a new set of metrics.

Implementation management software can help you do that. You can capture and analyze **all your step-by-step project data**, allowing services to track its transition from generating just enough revenue to cover its implementation costs (net neutral), to ultimately becoming revenue positive. Once those metrics are in place, the software can help you develop and track your compensation program.





Are you at risk of growth-led failure?

Simply put, to scale your software business, you'll need to continuously improve your implementation process.

With the right software tools, you can implement customers twice as fast; provide full visibility for your team and custom views for the client; maintain a highly secure project audit trail; and stop chasing spreadsheets and emails for weekly updates.

Take our easy 30-second assessment and see how your implementation program stacks up:

SCORE: NO = 1 PT SOMETIMES = 2 PTS YES = 3 PTS	EXAMPLE	YOUR SCORE
You've developed and follow standardized playbooks by client type	1	
You outline individual implementation roles at the outset	1	
You employ a consistent and clear communication process	2	
Your team always solicits customer KPIs at the outset	1	
You've made predictability a key process measurement	2	
Sales and service often work as a team	2	
You've established financial targets for your services personnel	1	
TOTAL SCORE	10	

SCORING:

22 Points or more:

You're doing a great job and setting industry standards for others.

11-19 Points:

You have some frameworks in place but you're missing out on other opportunities.

10 Points or less:

Your competitors are likely outshining you on delivery which indicates longer term risks.



Never stop improving your implementation process

Great software firms succeed and stay successful by always looking for ways to improve. Baton is focused on the implementation process because it's a critical driver of growth—helping your business keep the upward momentum going while also keeping your reputation intact.

See how a project management platform built especially for SaaS implementations can help your business accelerate revenue, scale implementation capacity and gain real-time visibility into the process.

Try Baton for free—you've got everything to gain.

ABOUT BATON: Baton is a software implementation management platform that automates, simplifies and accelerates even the most complex SaaS implementation projects. Our customers realize revenue quicker and continue to drive efficiencies with each new implementation.



BATON

Baton Technologies, Inc.

5 Crosby Street

New York, NY, 10013

Learn more at hellobaton.com

Contact us at info@hellobaton.com