How to successfully migrate to a new digital system

Appoint one or two employees to lead and assist their colleagues through the digital migration CREDIT:ASSOCIATED PRESS/JENS MEYER

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Two businesses share the benefits and challenges of moving to a new tech system.

When it comes to make-or-break business decisions, few come anywhere near the size and scope of migrating to a new digital system. With the technology landscape constantly evolving and driving even more efficiencies,
the need to keep up with the times and adapt to new ways of working is relentless.

But with so much of a fim's fortunes tied up in its ability to utilise that technology quickly and reliably (from service delivery and record keeping, to order-tracking and customer management) if it gets things wrong, the consequences can be dire.

Concierge company, The Organisers, is one that recently decided to take the digital plunge; in 2016, it moved to two new systems.

One was Voyager Infinity, a specialist recruitment agency tool that enables the company to contact candidates and keep records all in one place.

The the other was a customer relationship management (CRM) product tailored specifically for the legal market, called Clio.

The Organisers team used to use Microsoft Office systems, such as multiple Excel spreadsheets, project management tools, dropdowns, and Word documents, among others, explains managing director, Katie Shapley.

While it worked extremely well most of the time, it caused problems when several people needed to access the same system at once, because the system couldn't handle it.

"We had outgrown our systems, had too many clients, and needed to work much more collaboratively," she says. "I also wanted to get things out of people's heads and into a system."

She says that the biggest issue was how people dealt with the change, so to help them get to grips with the new system, the company appointed a member of staff who could talk them through how it worked.

"She is a very upbeat personality and encouraged everyone to get behind it. She's also very tech-minded, so when it came to installing and ensuring that the systems managed our needs, she was the perfect person for the job," says Ms Shapley.

Out with the old

They say it's the older generation that always has the hardest time dealing with new things, and at 155-years-old, Birmingham pressing and stamping specialist, Brandauer, could be considered something of an elder statesman in the business community.

The company supplies precision components for the automotive, aerospace, domestic goods, electronics and renewables sectors.

It moved from Trojan, a pre-Microsoft Windows DOS-based system with its own ASCII text interface (think Ceefax or Teletext), to Microsoft Navision, a standard Windows-based system.

The change was intended to help it cope more effectively with anticipated growth between now and 2020, and enables it to handle customer accounts and internal costs, generate financial reports, provide improved debtor management, and reduce paper and manual reporting.

 "It gives us real-time information that any staff member can use to make informed decisions on purchasing, planning and setting up manufacturing processes," explains Brandauer chief executive, Rowan Crozier.

But at a cost of £400,000 to implement, was the move worth all the hassle?

He says that six months into the process, he would have said no, because a system change of this magnitude upset the business's usually smooth operation. "Now we have overcome the teething problems,
it has been a worthwhile investment," he adds.

So what advice would those who've been through the process give to other SMEs mulling over a similar move?

Research

Spend time looking carefully at what you do now and how a new system will integrate with that. Do trials online with some shortlisted companies and get a group of staff together to look at the options.

"This is a huge business decision and different people see different challenges and opportunities, so don't make an insular decision," advises Ms Shapley.

Budget

Budget for your changes, because the best systems will be costly. There's also staffing costs to consider, as it takes time to train and bring people up to speed.

"It was also expensive in terms of time and manpower to find, investigate, install and train. It still remains more expensive than our previous structures and systems," says Ms Shapley.

Plan ahead – and include your staff

Even if things go wrong, there will be lags as one system is phased out and the other picks up the slack.

Mr Crozier suggests that businesses plan for the impact.

"For example, hold safety stock to compensate for downtime after you 'go live' – and allow a 25pc contingency in the budget for any unexpected oncosts," he says.

"The system changes will alter the way that everyone goes about their jobs, so cut down the barriers quickly and ensure that all staff members have bought into the change and why you are doing it."