Making The Switch:
11 Keys to a Smooth Transition

So you’ve decided to move to a new DMS provider. Now the real work begins. Here’s an 11-point plan for ensuring a smooth transition for you, your business, and your team.

The right system can net you tremendous efficiencies, help ensure you are compliant and save you money at every step along the way.

Most software providers have a process for onboarding dealers to new technology, and each will tell you the key to a successful switch are the high-impact contributions clients makes to the process. Let’s take a look at 11 critical steps to a smoother transition to a new DMS.
1. SOLICIT BUY-IN FROM STAFF

No one likes change, especially if it steals time away from putting more metal over the curb. So resistance is to be expected. That’s why it’s critical that you clearly outline your goals, objectives and what you’re hoping to gain by making the switch. If possible, allow key team members to help select the new software.

2. ENGAGE AND EMPOWER YOUR CONTROLLER

Your controller and/or accountant should be heavily involved in the transition. Accounting is the backbone of your business. If the portion of the DMS that drives those activities isn’t right, big problems lie ahead. So make sure to get input from your controller/CPA regarding the accounting settings before activating your new DMS.

3. SELECT A VENDOR WITH FLEXIBLE TRAINING OPTIONS

If you’re closing a customer just as the vendor’s DMS training session is about to start, by all means, close the deal. Your vendor should understand. In fact, the ones that do will offer a mix of on-demand training and multiple live training slots from which to choose. Just be sure your vendor provides an outlet for you and your staff to get any training-related questions answered after onboarding is complete.

4. CONSTANTLY COMMUNICATE

It might sound obvious, but commit to yourself, your staff and your vendor that you’ll invest the energy to openly communicate and be available for questions and support. And make sure your vendor is willing to do the same.

5. ASK THE VENDOR FOR A PROJECT PLAN

To increase your chances of a trouble-free launch, push your vendor for a project calendar that outlines each stage of the onboarding process. A big-picture preview of what’s ahead will help you plan and prioritize your other responsibilities accordingly.

6. ITEMIZE ALL MUST-HAVE FORMS, REPORTS, METRICS, AND QUEUES

Before the onboarding process kicks off, be sure to communicate a comprehensive list of your requirements to your new software provider. Detail what you need and how you need things to be structured. If this step is skipped or rushed, you might reach your go-live day and realize a crucial report or form is not customized correctly.
7. EXPECT SOME ADAPTION TO YOUR NEW SOFTWARE

While most DMS providers can tailor their technology to your needs, some things cannot be changed. A few procedures will likely run differently on your new DMS, and that’s OK. Embrace the change. You’re switching software to significantly improve your overall performance. Try not to worry about minor inefficiencies here and there — just as long as your overall result makes the transition worthwhile.

8. ANNOUNCE YOU’RE CUTTING THE CORD

This shouldn’t happen until your data transfer is complete, your people are fully trained, and you’ve conducted extensive testing. But once all that happens, eliminate the temptation to revert back to your old software by cutting the cord. Just communicate that plan to your team so they take training seriously.

9. PARTNER WITH YOUR NEW PROVIDER ON TRAINING ATTENDANCE AND ENGAGEMENT

Some companies will report back to dealers a list of who attended training. Even better, look for a provider that will measure employee engagement during the sessions, either through graded quizzes or some other type of certification confirming your employees understand how to use the new software.

10. VERIFY THAT ALL TRANSFERRED DATA IS 100% ACCURATE

This must absolutely be done prior to product launch and before turning off your legacy system. Data errors are not something you want to discover days or weeks later. So make time to sit down with your vendor and review a variety of customers in your database, from easy to complex. In many cases, errors can be corrected. In some instances, though, the data will not transfer the way you need it to, and an archive must be created.

11. DEDICATE TIME TO TESTING

You’ll want a user from each department running through their everyday processes on the new system. Make sure to run through an entire transaction as well as a few deal unwinds during testing. Be sure to pay close attention to the details. It’s better to catch errors now than wait until a small issue causes a huge headache.

Switching DMS providers can be time-intensive, but the rewards can be worth the effort. The right system can net you tremendous efficiencies, help ensure you’re compliant, and save you money at every step along the way.