IMPLEMENTATION
PLANNING AND DESIGN

LATVIV
Keeping the Spark Alive ™

IMPLEMENTATION BEST PRACTICES

Customer and vendor personnel interact with each other in circular phases, as outlined in the image below. These phases are circular since, after every cycle, there is an opportunity to sell more services and products and repeat the process. CSMs (customer success managers) are incented and should be motivated to keep repeating this cycle to boost vendor revenue. Excellence in each phase forms a strong foundation for the next phase and the next cycle iteration. Latviv advises vendor resources to follow best practices, risk assessments, checklists, and templates to pursue a consistent approach across all phases. This eBook outlines a few best practices applicable during the implementation planning and design sub-phase. The full list of these elements is prepackaged in the Latviv platform.

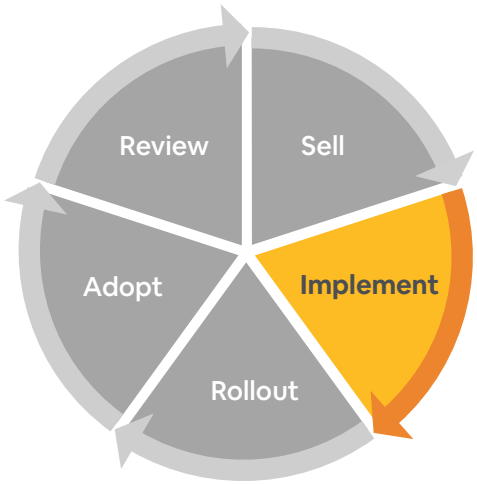

Figure: Customer Success Touchpoint Cycle

PLANNING AND DESIGN INTRODUCTION

Measure twice, cut once expression cannot be more appropriate during planning and design. Best executed projects have a vivid understanding of the result and are well thought through and account for all potential loose ends before undertaken. In this eBook, we cover project management, technical, usability, product, and functional design best practices.

PROJECT MANAGEMENT

Borrowing from Wikipedia's definition, project management is the practice of initiating, planning, executing, controlling, and closing a team's work to achieve specific goals and meet specific success criteria at the specified time. Latviv calls out the salient points that have stood out for us during our implementations.

The key responsibility of any customer-facing individual or a resource providing a service is to set and to meet expectations. These are typically the time duration, effort, and resources in terms of hours and cost. The vendor project manager collects this information from each resource tied to the project, aggregates all tasks, and streamlines them into a project plan. A project plan and supporting collateral are a means to document the project goals, milestones, activities leading to these milestones, and ownership with buffers for potential slippage. It is a means to outline best, worst-case scenarios and mitigation measures so that everyone is aware of and can plan for their next steps down the line.

It is the responsibility of vendor personnel, under the leadership of CSM, or CSM itself to anticipate all possible issues that could occur on the project, i.e., before they occur, and plan accordingly. This planning step includes the procurement of tools–technology, infrastructure, and a project governance team with escalation touchpoints both at customer and vendor. CSMs need to call out risks that they cannot mitigate so that everyone can accept them as they are or not take on the project. In a nutshell, the CSM and implementation manager should have a vision far out in the future and help the customer contact visualize that vision at the beginning of the project.

After setting these expectations, assigned vendor personnel should realize conveyed expectations gradually and surely. A key aspect of delivery management is boosting credibility with small wins. Customer contacts get nervous when vendors do not meet milestone dates. This point goes back to the setting of expectation responsibility. Be less ambitious in the beginning phases. Promise less and do more. Interestingly, this is all in your hands. These small tricks can make or break your projects.

After this initial but critical establishing-credibility phase, stay on schedule for all active projects. Best executed projects have a vivid understanding of the result, are well thought through, and account for all potential loose ends

before undertaken. Always have indefinite, reoccurring meetings until the implementation is complete, the customer deploys the solution, and successfully realizes it.

➤ Key Takeaways:

- Set and meet expectations
- Anticipate, plan, and socialize risks with stakeholders
- Build credibility with small wins
- Stay on schedule with indefinite, reoccurring touchpoint meetings

SIMPLICITY IN IMPLEMENTATIONS

The goal of every implementation should be the seamless deployment of the solution across the user community. End users do not have the time to learn new technologies, interfaces, and processes. They have their job to worry about, and most new optional asks of them typically fall on deaf ears. If something is designed to improve their lives and is simple to adopt, they will be all ears.

The solution should accordingly be usable, maintainable, and administrable. Do not over complicate implementations. Personality types that like challenges tend to over-analyze requirements and end up complicating the solution. Watch for this behavior in yourself or your customer side counterparts.

It is much easier to scale with these principles.

➤ Key Takeaways:

- Don't over complicate implementations
- Watch for personality types on your team that like to over-analyze requirements
- An intuitive implementation that makes end-users' lives easier and fruitful will achieve the most success

DESIGN REVIEW

All requirements and designs should be routed through a committee of experts, product managers, or solution architects to ensure that the organization blesses the design. Keep your ego aside if you think you are the expert and do not need others' buy-in. Make project success the entire organization's responsibility. Toe the official company line and strive for utmost transparency so that everyone, as a group, can watch for project risks and plan mitigation measures collectively.

Approach to the contrary will likely be at your own risk. If the project fails, you will be on the hook. As an investigation measure, your peers will request copies of all emails, notes, and documentation, putting you in a defensive position. Typically, after two or three failed projects, most CSMs and relevant vendor personae are asked to move on. So, do not push your luck.

PRODUCT LIMITATIONS - AVOID SAYING “NO” TO REQUESTED FEATURES

No enterprise software product is perfect. Product managers design them to work with numerous customers and, therefore, are set up with baseline functionalities. Implementation managers need to configure, and in seldom cases, customize platforms to align functionality with customer requirements. Configuring the most appropriate solution is the collective responsibility of the customer success and implementation managers.

When proactive customer contacts attempt to solve their need themselves in the context of the vendor's product, that they do not have much knowledge of, they inquire about functionality that may or may not be necessary for the implementation. When this requested functionality does not exist, customer success and implementation managers may find themselves in a spot. That brings up the question, "when to and when not to say 'no' when vendors don't have the requested functionality."

The word "no" clearly has a negative connotation and pushes a potential buyer or adopter of your product away from you. Keeping the prospect or recently signed customer engaged during such tricky conversations is an essential responsibility of these two roles.

A categorical "No" is better when a "yes" answer will mislead the customer and be a blatant lie. But when the question or functionality is irrelevant to the implementation, you can avoid saying "no" while staying honest to your customer.

You can and should avoid saying "No" when a better alternative exists or can be made available at short notice. Remember, you are the solution expert. Prepare your word tracks accordingly. For instance, you can start with "we have been implementing this solution for XX years" or "numerous customers have asked for this functionality; however, they have soon realized that the alternative approach is much more intuitive in the context of this other step."

➤ Key Takeaways:

- Do not mislead your customers. However, when a better solution exists or can be made available, you can avoid answering the customer's question with a black and white answer

PRODUCT ENHANCEMENT IDEAS

Customer interactions trigger and are a significant source of worthwhile product enhancement ideas. We touch on the product management topic here, since new feature ideas typically originate during implementation planning sessions, and it is valuable for both customer experience and customer success needs.

If you play a product manager role in addition to your customer success responsibilities, do not ask the customer to design the feature. Designing is your job. Moreover, you do not want the component to be specific to just one customer. Ask for feedback on the alpha or beta version instead if the customer proactively offers to help with this request. For consulting projects, where the solution is specific to just that particular customer, this recommendation may not apply.

In a product manager's role, stay creative, and always look for newer ideas, efficiencies, and processing techniques. Go beyond theoretical, irrespective of the company or technology you are representing. Always experiment, configure, implement, and program in a sandbox or at an actual client implementation. It is much easier to narrate experiences gathered from experimentation or real customer implementations and thereby demonstrate credibility in front of your customers.

Suffice it to say for now that your products should be deployable and should add business value to your customers.

➤ Key Takeaways:

- Only when a product is weaved into an organization's fabric and translates into a naturally understood value will find adoption
- Be creative, think out of the box, and build to scale

ABOUT LATVIV

Latviv is a provider of customer success management solutions and services, available as a cloud deployment option.

Latviv's solutions increase customer retention rates, boost upsell, cross-sell, and new license revenue, and help engage with prospects, with appealing customer success results.

Reliability and Better Security

The Latviv platform rides on the Google Cloud. Google provides cloud services reliably due to its experience operating its core services like Google Search. Security controls in the Google Cloud isolate and better protect data by various methods such as compartmentalization. The Google Cloud Platform meets the most stringent data security and data center reliability standards like SSAE16 and ISO27001, a level of protection that few corporate data centers can match.

The Latviv Difference

Latviv's SAAS platform passes the multi-tenant architecture cost savings to its clients, with an appealing pricing strategy. Latviv's scalable architecture and unique design make it easy to support its multiple client implementations on the same server instance. Each of Latviv's clients can, in turn, manage an unlimited number of their customers and engagements.

Latviv provides a rapid jump start through prebuilt content, system relationships, story tracks for working with all stakeholders, templates, and customer setup examples. System users can copy relevant content, update for their situation, and start using the system.

The platform uses an advanced decoupling framework to create a Lego block paradigm that Latviv users can use to create graphs, and capture disparate metrics, joined in user-determined dashboard views. With this highly flexible approach, users can create and articulate stories the way they want and link references to them to any system element.

Ask for a demo or better still, ask for free access. See it to believe it!

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