# A Strategic Framework for Seamless Platform Implementation

For some, the thought of software implementation may be overwhelming and sound complicated, but it doesn't have to be a daunting task. By following best practices derived from experts, you can streamline your Business Spend Management (BSM) platform implementation, maximize ROI, and set your business up for success before, during, and after project completion.

As you begin your spend management journey, it's crucial to have a clear vision of where you're at and where you want to go in order to get the most out of your implementation. During this requirements gathering phase, you must understand and identify the following:

**What is it about your company's current situation that's driving the need for a BSM platform?**

What is the root cause of the problem that needs to be solved and who's experiencing the pain? For example, you may have too much paper in Accounts Payable (AP), but the solution may not be OCR because the root cause is low adoption of an end-to-end P2P process where approvals, account coding, etc. are part of the up-front approval process. Other examples may include audit requirements, increased scalability for growth, bottom-line savings, cycle-time improvement, or reduction of manual processes.

**What are your business goals and objectives?**

You must consider where you are today and define where you want to be in the future. It's also important to identify the potential ROI of a solution to your company's current need or problem and determine the high-level strategies that will be supported by this initiative.

**Who are the key stakeholders?**

It's critical to identify the company leaders you will need support from to move forward with a successful implementation.

**Who and what teams are impacted?**

What are their pain points, challenges, and needs? If you get your teams involved early on, they're going to become your biggest advocates to help support the change as you implement software.

**What is the timeline for moving forward with the initiative?**

Before implementation, it's important to think ahead about competing projects, internal resource availability for supporting and managing your infrastructure, and any constraints that might prevent your company from moving forward.

Prioritizing these objectives will help you gain C-Suite support and define the success metrics and outcomes that govern your program. Once determined, these objectives will define the processes that need to change to achieve your goals. Moving into the implementation phase, you then have two main options: in-house or partner-led.

# In-House

In-house implementation is a DIY project that typically comes with more trial and error. This implementation must be balanced against competing projects as it requires additional internal resources that have both technical and procurement expertise.

## Pros

- Less initial costs
- Leverage and develop in-house talent that is less reliant on third parties if expansion or specialized use cases are needed in the future

## Cons

- Can result in an implementation that doesn't include best practices and impacts adoption
- Increased risk due to lack of experience and lack of proven methodologies ensuring a successful implementation
- Requires additional internal technical/ configuration resources
- Likely to have a longer Time to Value (TTV) and cost more as a result

# Partner-Led

When choosing a partner-led implementation, it's important that the partner also understands your business and strategic objectives. Implementation partners bring experience and expertise with the ability to troubleshoot any potential issues. They also understand the criteria and metrics for ensuring success during each phase of the project, while also building a design for a company's long-term business goals and scalability.

## Pros

- Less risk due to experience in successful implementations
- Avoid common mistakes and errors, which saves time, money, and resources
- Access to off-the-shelf connectors frees up internal resources
- Guides you through the process before and after implementation
- Ensures the system is scalable
- Shorter Time to Value
- Facilitated change management and project cost control
- Benchmarking and best practice against peers
- Uses an industry-specific approach – your partners work with others in your industry and understand the requirements for compliance, tax regulations, etc

## Cons

- Can cost more initially
- Still need an internal team to complement and collaborate on implementation to ensure the longevity of the software and manage ongoing support

# 4

# Considerations When Evaluating a Third-Party Implementation Partner

*Together with leading system integrators, [CrossCountry Consulting](#) and [The Shelby Group](#), we've put together a framework on how to select the right partner for a successful implementation:*

# 1 Experience and Practice Specialization

- Ensure that prospective partners have cross-functional resources with expertise in different departments. This includes procurement professionals, change management experts, and a tech-savvy team that understands finance and accounting needs.

- Look for partners who've implemented this project for companies similar to yours in size, industry, etc.

- Identify partners who have propriety/off-the-shelf connectors and support the applications that your business is using or plans to use in the future.

- Find partners that have invested in automation to accelerate your deployment project and have services to support you during the project.

- Assess the partner's fit with your company's culture while ensuring their ability to meet expectations for skills and knowledge.

## Ecosystem Integration:

Implementation involves more than just introducing new software to your business tech stack. It requires careful collaboration between existing software and future technology, as well as a thoughtful approach to integrating business processes. This is where your partner's off-the-shelf connectors play a crucial role. The connectors act as middleware, bridging gaps between disparate systems. This enables all of your information to seamlessly flow on one platform for enhanced data visibility and control, and boosted business performance. An experienced implementation partner will guide you in defining middleware needs, supporting scalability, and applying tailored best practices.

*"It is important to understand and evaluate the partner's procurement program management expertise in addition to their technical understanding of the platform and your integration requirements. Coupa's industry-leading technology platform enables your success. Your organization's procurement program —which includes your business case, procurement processes, supplier management, governance, and change management strategies — will drive the business outcomes that determine your success."*

**The Shelby Group**

*"When you're looking at a partner, you always want to consider experience and repetition. You want a partner that has been there before. You want a partner that's going to hold your hand and guide you through this process."*

**CrossCountry Consulting**

# 2 Success Methodologies



**An experienced partner** understands important criteria for ensuring success during each phase of the project, from building the business case to the requirements gathering, design, configuration, integration, testing, training, launch, and post-launch support.

**Evaluate the resources** the partner has developed for achieving success with the Coupa platform. This should include use-case libraries, documentation of best practices, industry thought leadership, and client case studies.



*"We use accelerators to reduce risk and improve implementation timelines. These accelerators are related to data conversion, configuration, and integration mapping. They are system and industry-specific and have evolved in our past experience delivering Coupa projects."*

**CrossCountry Consulting**

*"We use what we call a use case library. Shelby's done north of 350 implementations and with each one of those implementations, we take the lessons learned on the different use cases. The use cases are simply a transaction within the Coupa environment. And so we bring design to the customer to accelerate the timeline to success. We look at our use cases that we've collected and say based on your size, your peers, your competitors, these are the different configurations that they've done within the Coupa environment to be successful."*

**The Shelby Group**

# 3 Additional Services & Support

- Look for partners who have experience in servicing clients across all of the regions where you operate.

- Find qualified partners who have procurement operations support services that include the following: procurement help desk, supplier enablement, integration management, sourcing support, training, change management, and release management. In utilizing these services, an experienced partner will focus on helping you to define, train, and enable the resources needed to eventually bring these support functions in-house.

### Supplier Enablement

It's very important to look at partners that offer supplier enablement as a service because there may be a lot of suppliers to manage and you may not have the resources to get everyone live within the system.

*"Supplier enablement is key because the way you manage change is not just internal, but also external with your suppliers who are part of the process. Supplier enablement is where you get a lot of efficiencies for your organization."*

CrossCountry Consulting

- **Post Implementation:** The goal of your implementation partner should be to provide expert assistance during the requirements, design, and implementation phases, and then augment support as needed until your organization has sufficient resources in place to support the platform on an ongoing basis with internal resources. A good partner will ensure that you can manage the software and the project after implementation. As you plan and design the project implementation, get an understanding of what commitments are required. Make sure you have the resources and if you don't, make sure your partner is able to support you as you backfill those roles.

# 4 Proven History of Success

**Look for partners** who have a proven track record of successful implementations.

**While references are important**, you should also ask for a list of clients that the partner has implemented for before. Select a few who began their transformation journey with business objectives and maturity levels similar to those of your organization and ask for introductions to those clients in order to better vet the partner versus them just providing a list of positive references.

**As you move along the journey** of your implementation, keep in mind that your software vendor should continue to own the relationship, not the implementation partner. Your vendor should be in complete alignment with the progress of implementation and be a point of escalation if required. They should also be tracking the implementation against success metrics based on your business goals to ensure it's moving forward as planned.

# The Coupa Advantage:
# Implement Once and Implement Right

**Customer success begins with a seamless implementation experience**, which is why Coupa carefully selects its implementation partners to move projects forward. While implementation is a temporary project, it has long-term impacts across your organization and should be carefully considered with your future business goals. A thoughtful and meticulous implementation upfront will ultimately set your company up for success in the future. Because Coupa doesn't exist in a silo, you need to have a comprehensive understanding of the platform and your technology roadmap to reap all of the benefits that implementation design has to offer. For example, if you expand to new markets outside of the U.S. or onboard new employees,  your technology and processes need to adjust to expand with you. This is especially important for fast-growth companies that are growing organically and through acquisitions. In the event of an acquisition, these companies typically take on new ERPs and financial processes that require consolidation. That's why Coupa's platform is designed for easy configuration – so that it can grow, stretch, and flex as your business evolves. Coupa and its trusted partners can help strategize and build your technology roadmap during these growth moments to ensure that the platform scales with you, preventing the costly disruptions and retrofits of your original design. By carefully considering your implementation process and partner, you can set your company up for success and maximize the value of the Coupa platform.

*"The reason I selected Coupa was, number one, the ease of implementation. Instead of having to build the system internally and spend all that time training to bring that system up, we were able to implement it much faster."*
**- Cellerant Therapeutics**

*"The implementation of Coupa was kind of an interesting process for Juniper. As opposed to many traditional IT projects that are labor-intensive and require a lot of IT expertise, this one just didn't. The business took a very active role in the implementation and actually drove the IT team in ways that they never had before, so it was a very business-led implementation. As most of the IT organization, in fact most of the business, was focused on this big difficult ERP implementation, a very small ninja group of business people and a couple of IT guys got together and implemented Coupa almost overnight. It was just that simple. So we woke up one day, we had Coupa implemented and everyone was pretty excited about it."* **- Juniper Networks**

**Coupa customers experience a smooth implementation process and a shorter Time to Value (TTV):**

scale
*14 weeks*

Thumbtack
*12 weeks*

Cockroach Labs
*11 weeks*

Crusoe
*11 weeks*

**Contact your Coupa representative to learn more about implementation best practices.**

# About Coupa

Coupa is the cloud-based Business Spend Management (BSM) platform that unifies processes across supply chain, procurement, and finance functions. Coupa empowers organizations around the world to maximize value and operationalize purpose through their business spend.

Coupa's community of 3,000+ customers use the platform to maximize the value of nearly $5T of direct and indirect spend to date.

**For more information, visit coupa.com.**

❋ **coupa** | The Trusted Platform for
Business Spend Management