COMPLEAT

Guide

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Introduction

At Compleat Software we have many years of experience in helping organisations to select and successfully deploy Purchase to Pay automation solutions.

Our customers range from a very small 3 user organisation using CLOUD Compleat through to a 1,300 user deployment across 26 separate schools and head office functions, all using the same software application.

Compleat Spend Control offers every business a truly strategic solution, allowing the business to address the immediate requirements, but do so with the comfort that Compleat will enable them to increase both the reach and sophistication of the solution as and when it becomes a necessity. Compleat Spend Control is also unique because our focus has been to remove the complexity and costs usually associated with this type of automation. Our CLOUD Compleat "Pilot" 10 – 20 user deployments are usually live within a week, often requiring just 2 or 3 days of our time and just one day of our customers' time in total. As important, the cost per users starts at £15 per user per month and then reduces as the number of users' increases. Compleat is very affordable.

As the vast majority of our customers are "first time users" of this type of application, we recognise that without the right guidance, the path to P2P automation can be a rocky one. Successful projects always start with clearly defined objectives that can be realistically achieved within the available time.

This guide represents our experience of the ten most common pitfalls and how you can avoid repeating other people's mistakes and deliver a successful project on time and on budget.

I recommend that you also take a couple of minutes to find out how The Zoological Society of London took our advice on how to overcome internal budget and resourcing restraints and are now reaping the rewards. ZSL User Story

Neil Robertson
CEO
Compleat Software Limited

Starting a project that will never get approved

Most people view automating the purchasing process across the entire business as a big project because it is going to change the working practices of a significant proportion of the people in the organisation.

As with all large projects, they need a lot of resource to quantify the requirements, review potential suppliers and then implement. They also need board approval to make the investment.

The reality is that even if the initial requirements and selection phase are completed, the project often fails to achieve board approval. The budget holders have their own pet projects (and P2P is competition for the resources and funds), or they object to the perceived interference on how they spend their budgets, or the organisation simply does not have the appetite to consume the cash at this time. Sometimes, the project can be deferred for all of the above reasons.

These barriers of available resources, budget holder support and approved funding can all be side-lined by taking a more strategic approach to the project.

Purchasing automation usually has the full support of the finance department, IT and facilities management, so why not start there? Focus on an initial pilot project as proof of concept, build advocates and create the beachhead that enables corporate wide rollout over time.

The project is then small, has a low corporate profile, is low risk and low cost. It is very fast and simple to deploy, easy to digest and avoids political push back from the other budget holders, but still achieves delivering a successful start to the strategy and the foundation stone for a gradual rollout.

Consider a CLOUD based solution. It can be live in as little as two or three days and can cost as little as £150 per month for a 10 user pilot scheme. If it fails for any reason, you simply stop paying.

When it succeeds, you have a proven solution, multiple staff as advocates, quantified and demonstrable savings that more than cover the costs delivering the ideal platform to induct the next department or location.

The purchasing automation strategy gets underway and the journey commenced.

Tip - Reduce the costs, risks and resources required to commence a purchasing automation project to get started, and then systematically induct other departments based on proven and demonstrable benefits.

Focussing on today's problem and not the bigger picture

There is always the temptation to solve an immediate recognised problem and fail to see the bigger picture.

Many organisations have automated bits of the purchase to pay cycle, often using different software products and vendors to address specific pain points. This approach does reduce the immediate pain, but will also automatically limit the ability to address future automation requirements as often these point solutions are "dead ends".

A strategic solution enables the organisation to achieve the same initial objectives as the point solution and do so at equivalent pricing. However, the strategic solution will then provide the ability to keep on growing in sophistication and reach, delivering a single holistic solution to the business that continues to address their requirements into the future.

There are also many advantages to the strategic solution also being accounting software agnostic, as the probability is that whilst the accounting software may change over time, the P2P solution will remain a constant.

The ideal software solution to address the widest market is a single product that can be implemented in CLOUD or locally on your own infrastructure with the ability to easily move between environments at any time.

The same solution should also address a simple CLOUD requirement and be live in a day or two, whilst also addressing the very sophisticated requirements of £1bn plus organisations – and all points between.

It ensures that your investment is future proof and delivers the platform that enables each business to become increasing sophisticated in their control of spend over time.

But perhaps the most critical factor is cost of ownership, as it is only when a strategic solution is delivered at a price point that is affordable and justifiable to the mass market will the same mass market start to take control over corporate spend.

Tip - It is a journey, not a destination – make sure you think, plan and execute on that basis and you will deliver a far better way of working for the organisation and leverage a very high proportion of the available benefits as a result.

Buy the 'end game' and forgetting the journey to achieve it

Software providers are very good at selling the "end game", demonstrating impressive dashboards, monitored KPI's and the flashy bits of the software. It is all very compelling.

The reality of deploying a successful P2P solution is very different. A P2P project is going to change the working practises of everyone involved in the purchasing process and unless you succeed in getting that adoption from the users, all of the dashboards and KPI's will be inaccurate.

The biggest challenge of a P2P project is achieving user adoption, so you should spend more time investigating how the project will achieve the end game and not just the end game itself.

The worst mistake is trying to implement a solution across the organisation in a single stride – the "Big Bang" approach, as it will inevitably fail. You will be asked by the consultant to make dozens, if not hundreds of decisions about how the solution will be configured and deployed and whilst the consultant may be confident in their ability to execute your decisions, are you as confident in getting every decision right first time?

As almost every business is a "first time" user, you should consider the project as a journey over time where each step improves your understanding and ensures that the benefits achieved apply just as much to the users as it does to the business as a whole.

Tip - Evaluate potential suppliers on how they propose to deploy the solution as a critical part of the selection process. If you need to raise the subject, you should already have concerns.

Assuming every type of purchase is suitable for P2P automation

There is a danger that in the desire to enforce the new controls over spending, the process is applied without considering the practicalities.

There are always exceptional circumstances where the importance of speed outweighs the benefits of process.

Accept this fact and avoid the mistake of alienating users by being pedantic rather than pragmatic.

It will help in the process of winning the hearts and minds of all the staff that will need to change their working practices.

Tip - Be pragmatic where appropriate in the early stages of the project as trying to force people to undertake a totally impractical process can result in them not using it at all.

Over complicating the process from the outset

It is an impossible task to try and document every single manual purchasing procedure across the entire business. Most organisations will use multiple different methods to order goods and services and they will vary by individual, departments and the nature of the purchase itself.

Many organisations start a documentation process of requirements. The project grows in direct proportion to the level of investigation and documentation undertaken. The more diligent you are the more complex and expensive the project becomes until it is too big, complex and expensive to afford or digest.

It is a basic fact that automating a purchasing process can be extremely simple, because everybody fundamentally goes through similar processes. The mistake is to be too proscriptive in allowable processes during the early implementation. The more you lock down what a user can do the more probable you will make an ordering process unnecessarily difficult and slow, if not impossible.

If you keep the process very simple and give the users latitude, it avoids user alienation and frustration which will not only impact adoption but also require a great deal of your time to manage.

Once you achieve user adoption, you have the ability to systematically increase the level of control. This may be based on spending limits, approval workflow, which suppliers, products and delivery addresses are available, but whatever the change, the push back from users is minimal.

Tip - Avoid over complicating the initial project goals at the outset. Keep it simple, easy-to-use and relatively generic so that it works for everyone, then get smart as you gain the detailed knowledge of how to maximise the benefits available.

Relying on the experts to decide if 'easy to use'

"Ease-of-Use" is not a quantifiable objective as it is dependent on the skills and experience of every individual. The mistake is to only include the finance department and IT staff in the evaluation of a potential solution, as these people have the strongest skills in the daily use of the most complex applications in the business.

It is far more important to assess the easeof- use on non-finance and IT staff, as these people will make up the vast majority of the users and success is absolutely dependant on their adoption with minimal difficulty and training.

Involving the users that will take part in the pilot scheme has many advantages. It will improve their buy-in to the project whilst providing a more objective and

informed view of "ease-of-use".

A decision being handed down from above without the user's involvement and contribution, may be appropriate for many applications, but it is not the best approach for a P2P project.

Tip - Involve Pilot users in the project as early as possible, including the initial demonstrations and listen to what they say. Their opinion will potentially reflect more than 80% of the users in most P2P projects and their buy-in to the project is essential for success.

Not recognising that people are the biggest challenge

The biggest mistake of all is not recognising from the outset that a successful project is dependent on gaining 100% user adoption and that not all of the users are going to welcome the change.

It is essential to ensure that the pilot phases of the process are focused on improving the user's daily work experience, making their lives easier and more productive. A successful pilot creates the advocates that help gain the proactive buy-in of more users and departments as the solution is rolled out.

The primary reason for the pilot is to ensure that the number of users is kept to a minimum. It is easy to manage a few people and work with them to get the best result, but it is almost impossible to deal with dozens or hundreds of users during a "Big Bang" approach..

Tip - Keep the user experiences front of mind and don't allow the corporate end game to put user adoption at risk. Without user adoption, you will never achieve the end game.

Trying to eat the elephant whole

Accept the fact that a fully deployed P2P solution that automates the purchasing process across the entire organisation is a BIG project, as often it will involve more than 50% of the staff.

The major challenge of a successful project is achieving 100% user adoption – so it is all about the people and delivering them benefits so that they willingly use the solution.

The elephant is the user adoption, not the software delivery and configuration process. The simple fact is that any project team can only digest a small number of users at a time to get the best results.

P2P can be SIMPLE, easy to deploy and deliver most of the benefits without getting complex – provided that you eat the elephant in digestible chunks.

Tip - Start with a small pilot project. It offers a low risk, low cost entry point that can be easily digested and proves the value of the project. It is also provides the ideal platform to then expand the project over time, as resources and funding allow.

Trying to cram every requirement into the initial implementation

Almost every business we encounter is a "first time user". The very fact that they recognise the issues and have embarked on a P2P project reflects the growing trend of smart and forward thinking organisations that want to get control over corporate spending.

The flip side is that there is a tendency to over intellectualise what is required and then try to cram it all into the initial implementation. Simply put – the solution gets complex before anyone has any experience of what works best in the real world.

The reality is that a P2P solution in its most basic form delivers perhaps 70% of all the benefits that will ultimately be achieved, yet it takes perhaps only 25% of the effort and cost.

P2P is a journey that will never end. As organisations evolve, suppliers will change as will the staff that use the application. Planning a very long journey without previous experience is hard to do.

Undertaking a short and simply journey is easy, inexpensive and offers a very high probability of success. It is called the pilot.

Tip - Avoid making what could be very simple, more difficult. A basic implementation of P2P delivers fully commitment accounting (soft and hard commitments), automated budget control, formal approval processes and formal purchase orders, automated receipting and purchase invoice approval process all integrated into your accounting /ERP software. It delivers 100% visibility of every transaction throughout its life cycle. That is a good place to build on.

Believing there is never a good time to start

Today, there are over 300,000 UK businesses that turnover between £5m and £250m, yet if you count the number of implementations of full P2P solutions in that sector; it is less than a few thousand.

This document details some of the reasons of why the mass market remain on manual systems, but the biggest by far is that historically, the provider of P2P solutions have remained focused on larger organisations and the public sector because they offer the big ticket sales, thereby pricing themselves out of the mass market sector.

There will never be an ideal time to start a huge project, but if a pilot project can be deployed in as little as 2 days and cost just £100 per month for 10 users then it changes the dynamics of P2P automation.

The unique approach of commencing automation with a small pilot scheme (usually encompassing finance, IT and facilities management) enables management to bypass the political, financial and resourcing barriers.

The strategic nature of Compleat Spend Control functionality ensures that the initial beachhead implementation can then grow to meet all the business requirements successfully.

Tip - Recognise that there will never be a good time to start a full P2P project – but you could start a Compleat "Pilot" and be live in just a few days. It is time to rethink P2P automation.

COMPLEAT

Compleat Software is a leading provider of powerful spend management solutions for SMEs that eliminates paper and unites finance, procurement and budget holders, providing an accurate, real-time picture of company finances. Offering the next generation of purchasing and budget management automation at an affordable cost, its P2P software comprises solutions for e-invoicing, purchase invoice approval, purchase order and receipting, employee expenses, contract management, and report generation. For further information about our capabilities please visit and to learn how we empower results for clients, please visit our **website**.

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