

# Know Your Stakeholders

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Who to Include in the Software Buying Process



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# Know Your Stakeholders: Who to Include in the Software Buying Process

You're excited. You just found the perfect CMMS solution that'll solve all your company's problems and make you look like a rock star because...

1. You turned over every rock during the search.
2. The solution you found will save thousands of dollars.
3. It'll be a cinch to implement.
4. Management will love it.
5. A conference room will be named after you.

*Don't underestimate the importance of knowing your internal audience. You'll need to meet both their business and emotional needs.*

You covered all the bases. Or did you?

- Did you identify **all** the people and groups (the "stakeholders") who might be impacted by your purchasing decision?
- Did you take time to understand, document, and address each stakeholder's needs?

## Identify Your Stakeholders and Know Their Needs

If you're the one in your organization tasked to find software, don't underestimate the importance of knowing your internal audience. You'll need to meet both their **business and emotional needs** if you hope to be truly successful in your procurement and implementation.

In the CMMS buying process, there are several key stakeholder groups to consider:

- Users
- Senior Managers
- IT Managers
- Procurement Managers
- Financial Managers
- Legal/Compliance Officers

Think carefully about how your efforts to procure, install, and use maintenance management software would impact each role. Starting with these three questions might help you avoid some pitfalls.

- How is this program likely to affect each person's daily workload positively or negatively?
- How might this program threaten each person's job, work performance, or domain of responsibility?
- Is it possible that this person might have emotional reasons to oppose the program? What could they be?

## Users: “I Have to Learn a New System?”

Users are any staff that’ll be operating the software in their day-to-day jobs. The most frequently stated concern among users is **ease of use**. A system that’s difficult to learn and navigate won’t be adopted quickly by the people who’ll be logging in the most. And software that’s not used will never produce the desired results.

To avoid becoming a victim of poor user adoption, you need to:

- **Listen**—and develop an understanding of the users’ concerns. Ask some probing questions to understand what users like and don’t like about the programs they currently use.
- **Do your homework**. Be sure to vet all potential solutions for usability based on what you learned from your discussions with users.
- **Evangelize** the merits of the chosen solution—prior to implementation. Explain to those who’ll be using the software what it does and how it does it. Sometimes establishing the right expectations is half the battle.
- **Train. Train. Train**. Be sure to purchase good training and let users know they’ll be getting it. Before go-live day, ensure all key users have been trained.

Follow these steps and you’ll be able to dampen the fears of even the most skeptical or hesitant users.

## IT Managers: “What Will It Do to My Network?”

Whatever solution you buy, IT Managers know they’ll be required to provide technical support at some point. Even hosted/cloud solutions require access through your organization’s network. That’s IT’s domain. IT managers are likely to care very little about how much software costs, or even how much it will improve company performance. They’re much more likely to ask questions like...

- How will it impact my IT infrastructure and to what extent?
- Will I be required to provide technical and usability support?

To win over these stakeholders, you’ll need to reassure them that the CMMS solution you’ll choose is designed to integrate seamlessly with existing infrastructure and won’t place undue demands on their network. They also need to know that your vendor has excellent user support, current technology, and rock-solid security features.

Don’t hesitate to voice these concerns to sales reps when shopping for software. Most will be glad to arm you with all the information you need to fend off any IT concerns. They’ll likely also be happy to speak directly with your IT manager, if that’s a better approach.

## Senior Managers: “I Need to Hit My Numbers (and Look Good Doing It)”

Senior managers are responsible for coordinating resources (assets and personnel) toward the achievement of quantifiable goals. If your senior managers are doing their jobs well, they’ll primarily be concerned with “hitting their numbers.” Depending on their level or their title, those numbers could include any of the following:

- Units produced
- Savings generated
- Revenue generated
- Net gain in productivity
- Quality (measured in various ways)
- Cycle time

Count on your company's senior managers to care how CMMS will affect the organization's numbers—especially the ones important to them. They'll need assurance that the new software will impact performance in a positive direction.

So how can you satisfy their specific demands—without having to earn an MBA—before you search for software? Simply ask. Sometimes just making the effort to find out what's most important to them will be enough. And you'll likely come away from the discussion with a much clearer idea of the reports they'll want from a maintenance software solution.

A few good questions to start with:

- What key business metrics do you watch most closely?
- What top three things would you want to achieve with a new CMMS?
- How would you like the CMMS to improve company performance?
- Does the product need to include certain reports?

*Remember that senior managers are people, too. Consider how helping them achieve their goals will make them look good.*

Remember that senior managers are people, too. Consider how helping them achieve their goals will make them look good, and will motivate them to nurture and support your CMMS implementation efforts.

## Procurement: “Be Sure to Follow the Process”

Procurement are the folks who issue purchase orders. This is where you take “red tape” and turn it into “processed paperwork.” What are the key things you need to understand?

- Which forms do you need to fill out?
- What “gotchas” do you need to avoid when filling out the forms?
- How does procurement issue a purchase order from your company to the software vendor?
- What's the lead-time from purchasing decision to issued order?

A common concern for procurement managers in the software buying process is whether or not you know the administrative steps to follow. Familiarizing yourself with how the purchasing process works will avoid delays and bureaucratic roadblocks.

It doesn't hurt, either, to get to know the people in this department early in your search for software. An established relationship and a proactive approach may save you weeks when it's time to actually make the purchase. Get on procurement's bad side and you may wait a year before seeing your purchase order.

## Finance: “Show You What Money?”

Finance is the department responsible for the budget, typically headed by a Controller or CFO. Including Finance early in your process can prevent show-stopping holdups down the line. Mostly, this amounts to making a courtesy call to ensure funding’s been approved. Doing so will help you validate there’s money earmarked in the budget to make the software purchase.

The alternative isn’t pretty. You’re in for a big disappointment if you’ve covered all the other bases, only to find your company hasn’t allocated funding for your procurement.

## Legal and Compliance: “Will It Help Us Follow the Rules?”

Legal and Compliance departments make sure laws, policies, and regulations are followed. Their job is to ask a couple specific questions:

- Are we abiding by legal/governmental regulations?
- Are we abiding by internal company policies and guidelines?

Again, think “courtesy call.” Make sure legal and compliance concerns are heard before you get too far into the buying process. Your goal is to avoid late-stage show-stoppers that may derail your procurement.

## The Value of Listening and Hearing

The bottom line: Make sure you know your stakeholders in the software buying process and do your best to meet their needs.

- Do your homework—take the time to know and understand your stakeholders and their motivations.
- Listen to and understand their needs.
- Address these needs directly.

Often, simply involving stakeholders in the buying process at the appropriate time can prevent many issues. Do this, and you’ll be surprised at how much faster the software gets purchased—and the “[your name here] Conference Room” plaque goes up on that door down the hall.

*You’re in for a big disappointment if you’ve covered all the other bases, only to find your company hasn’t allocated funding for your procurement.*

## About the Author

Jason joined MPulse in early 2011. No stranger to the industrial and facilities world, Jason worked as an industrial electrician during high school and college at factories in High Point, NC.

Jason's eclectic career includes stints as a US Army officer and a rock music photojournalist—but his core focus has always been high tech sales, marketing, and product development. He has provided consulting and executive management for many industry leaders, including Microsoft, Seagate, Avaya, NTT Verio, and NetApp. Advising the US government, Jason has led key technology product development projects for the US Air Force, the US Navy, and the Department of Homeland Security.

## About MPulse Maintenance Software

At MPulse, we believe that maintenance software should make your life easier and your organization more productive. We provide equipment and facilities maintenance solutions with scheduling, tracking, and reporting tools you can depend on.

From small maintenance shops in public schools and commercial laundries to large maintenance departments in global enterprises like IKEA and Caterpillar, we've become a trusted maintenance management partner. MPulse Maintenance Software gives you the control you need to get things done and the accuracy you demand to report your results confidently.

For over 16 years, MPulse has been an industry leader in maintenance management software. Founded in 1995 as a division of SpecTech, Inc., MPulse is led by a group of veteran high tech and software experts with deep experience in the maintenance world.

With our easy-to-use EAM/CMMS software, MPulse customers reduce maintenance expenses, minimize downtime, extend equipment life, and boost productivity throughout their organizations. With MPulse, your maintenance department truly becomes a profit center.

**We Make Software that Works for Working People.™**

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