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# **A 5-step checklist for successful procurement technology implementation**



The success of your transformation project like most major IT projects depends on how well it is implemented. Quite so often, while the **procurement software** evaluation involves multiple rounds of demos, workshops, proof of concept pilots etc., the implementation process is relegated to a check-box afterthought during the evaluation process.

One size does not fit all and too many implementations end up failing to produce the expected results – end-user adoption

and desired behavior change.

**Large IT projects run  
45% over budget and  
7% over time, while delivering  
56% less value than predicted.**

–A McKinsey and University of Oxford Research

The companies that defy these odds are the ones that master key dimensions that align IT and business value. This is even more crucial now in the new-normal with

remote collaboration across teams, entities and within organizations at large. Choosing the right approach can make the difference between a failed implementation and stellar success.

In order to help you get your implementation right, we've put together a 5-step **procurement implementation** checklist.

# 5 Step Procurement Implementation Checklist

01

## Know Your Customization Needs

Work with the vendor to create a list of what you'd like to modify and establish an implementation checkpoint for the vendor to review the configuration tweaks that you request. For example, **eProcurement software** (RFx, e-invoicing, e-payment et.al.) users often want specific workflows added to the system, and buyer groups like to customize the fields to make data entry smoother.

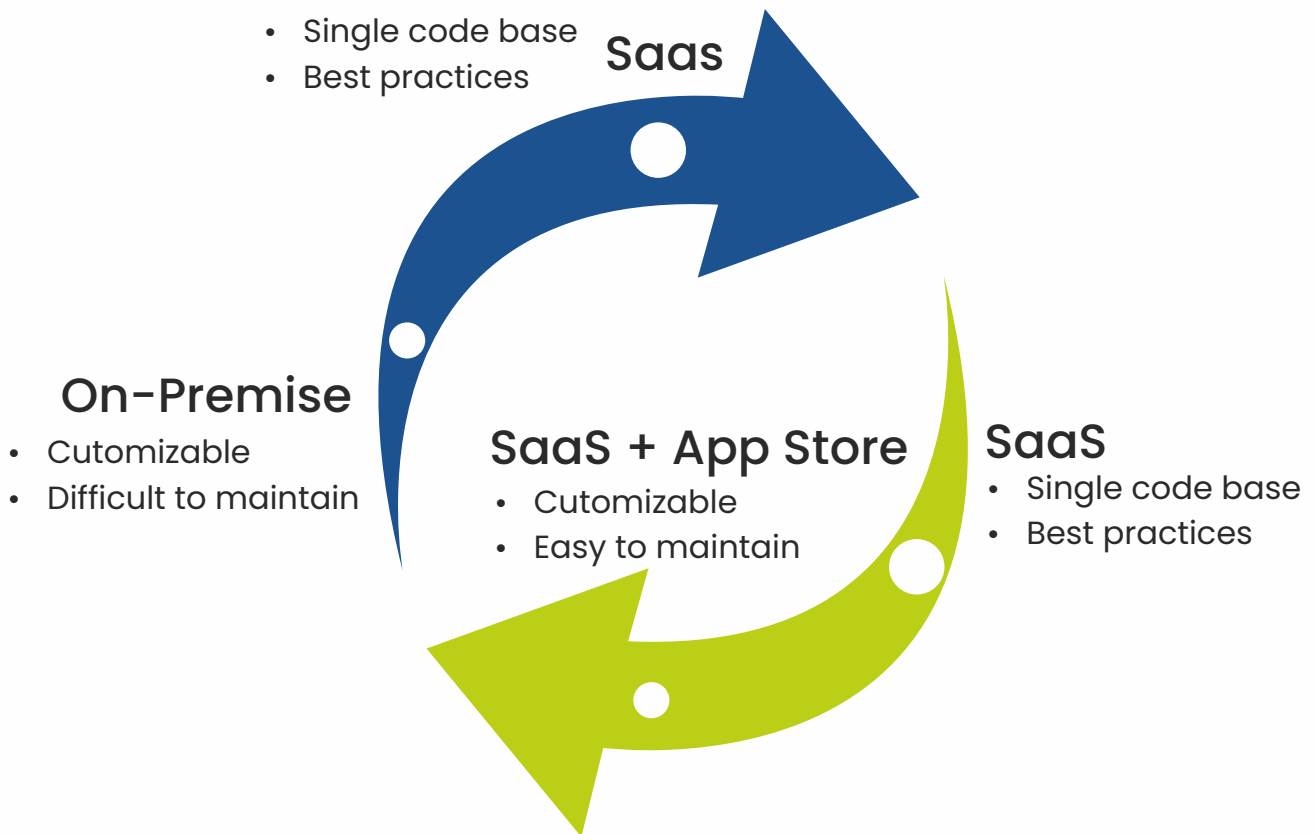
Your industry and the type of workflows you need will impact what should be configured, but the list may include: Adding or removing fields, establishing custom workflows, setting up access to features by role, matching user interface to brand colors and logos, integration with specific requirements, etc.

Managing configurations and personalization ahead of time ensures that users can get the most value from the software from the beginning.

However, going a step further, customization is a term referred to when an additional feature or a functionality is needed that would entail changing the code base (software developmental efforts). Not all cloud solutions can be customized. A lot of vendors offer ready to use system that requires no customization at all. The problem if you choose this kind of system is, your business flows will be adjusted to how the system works. And usually, SaaS comes with this shortcoming of not being customizable, on per instance basis.

But the good news is, SaaS has now come full circle.

In the early 2000's, SaaS - also known as on-demand software - disrupted heavy on-prem installations, but it offered one size fits all in the name of best practice



However, SaaS could also fit the gap of not being customizable with a best-in-class App Store that could enable customization, while still retaining all the benefits of cloud solutions.

This way, you can tweak your cloud software based on vertical, category or geography, as needed.



One of the caution points in decision making is not losing your competitive advantage while leveraging SaaS capabilities. Many organizations have niche **procurement processes** that provide them a competitive advantage. When moving to a SaaS product, care should be taken that the product is flexible enough to accommodate the niche processes that are important for your business. Also, the implementation team should understand these processes & provide direction accordingly.

## Integration with existing internal systems

It is useful to know if the software is compatible with your current tech stack and can integrate easily. The most common example being, you may want to integrate the procurement system with your back-end ERP so that you carry out most of your procurement operations from a specialized software, while you retain your ERP as the system of records (SOR) or the single-source-of-truth.

Most of the procurement solutions on cloud, do come with the latest technical capabilities to integrate with standard enterprise applications. The integrating enterprise applications may be on premise or on cloud. It is important to align the overall enterprise architecture for inclusion of a new SaaS product. Typically, organizations do have 'Architecture Review Boards' (ARB) or similar bodies who provide strategic directions for new product incubation. For a successful implementation, following points should be considered from an integration perspective:

- A** Strategic direction and alignment with Enterprise Architects or ARB. Successful implementations are based on strong foundation laid by the enterprise architects
- B** Weighing pros and cons of point-to-point integration using adapters or leveraging middleware technologies like Mulesoft, TIBCO etc.
- C** Optimal integration designs: Proper evaluation must be done for integration design aspects like real time vs batch, frequency of batch integration etc.
- D** Integration testing: Insufficient testing can lead to defective solution getting deployed and unplanned over testing can deplete the organization's resources. Integration test strategies and execution are important aspects for overall success of the implementation
- E** Deployment and roll-out strategies need to consider impacts and capabilities of integration

## Ensure Future Scalability

You need to make sure the system can grow along with your company. Every vendor has their own policy regarding the product they offer. Commonly, there are two types of licenses provided by the vendors – one-time license and subscription license.

The software implementation price is also influenced by the license model. A lot of people prefer the subscription model since it's cheaper. So, it is imperative to take notes on how much of your staff (and maybe yourself) will have access to the system. The more users that have access, the more money you will spend on implementation.

Negotiating on the flexibility upfront is the key to scaling optimally in cases of a ramp up (or ramp down). Most providers offer multitenancy to support scalability.

Ultimately, if your system is unable to support your bottom line, then it's not the best software for your company.

Scalability has got multiple dimensions and all these needs to be considered while deciding to go with a particular product and implementation team –

- A User scalability:** Long term view on users of the system (e.g. any acquisition in pipeline, new business lines getting opened up etc.)
- B Product feature scalability:** Cloud products necessarily gives control to the product companies, who come up with releases and version upgrades
- C Digital scalability:** New age digital solutions leveraging AI, ML etc. needs to have a procurement system that can support the transaction, integration, and response actions

## Guard For Implementation Delays

One of the advantages of cloud procurement products is the ability to go-live quickly. While the product provides the capabilities for quick enablement, the implementation teams play a key role in ensuring optimal design, build and testing duration. The delays can be caused due to multiple reasons. Some of the common root causes for delayed implementation timelines are:

- A** Leadership alignment and alignment of objectives for business and IT goals
- B** Multiple stakeholders and lack of single point of ownership in decision making
- C** Insufficient knowledge or experience of the implementation teams
- D** Lack of working partnership between the product vendor and the implementation team
- E** Non-flexible product that does not provide easy capabilities to configure

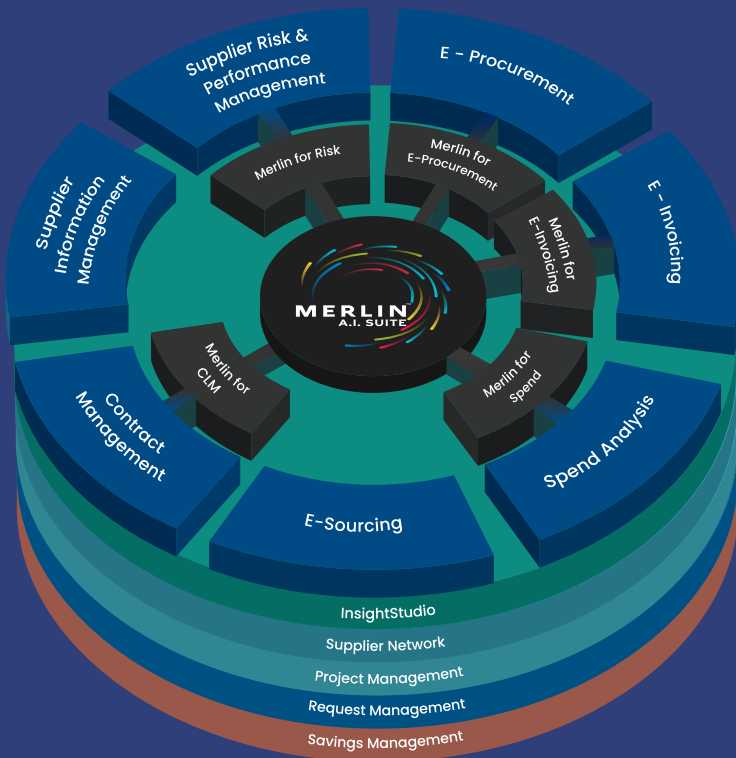
## Adoption challenges & low ROI: Know the reasons

Here are the most common reasons found for failures of S2P software implementations:

- A Lack of clear objectives:** If a company does not calculate pre-implementation assessments of critical objectives, it becomes impossible to pinpoint the issues responsible for either success or failure. You need to identify the right technology partner to define the requirements and success criteria of the project clearly, more so because of the depth that **S2P suite** would entail.
- B Software is just a technology enabler:** One cannot expect a software to go live and solve all the business problems, it should be looked upon as an enabler by doing the right things the right way.
- C Choosing the wrong S2P vendor:** Organizations are getting smarter with access to unlimited data about software vendors in the markets. More and more stakeholders can get involved in the assessment of the right fit product due to virtual collaboration. Due to this level of depth, it has worked well for software providers that are more product-led than marketing-led. If the software itself is not flexible enough to handle changes in business processes or can't support the number of users, the project can fail.
- D Low User Adoption:** One of the key reasons for this is user friendliness of the solution. In addition to the obvious socialization of the solution thoroughly within the business user groups, having a seamless, consistent user interface is key to user adoption. For example, the user should be able to trouble-shoot herself when she is stuck with a workflow. This is possible with help videos, live chats, simple-to-use navigation, swift user journeys, etc.

We recommend using this 5-step checklist as a ready reckoner, while you work with your technology and implementation vendors on your procurement transformation initiative.





Zycus is the pioneer in Cognitive Procurement software and has been a trusted partner of choice for large global enterprises for two decades. Zycus has been consistently recognized by Gartner, Forrester, and other analysts for its Source to Pay integrated suite.

Zycus powers its S2P software with the revolutionary Merlin AI Suite. Merlin AI takes over the tactical tasks and empowers procurement and AP officers to focus on strategic projects; offers data-driven actionable insights for quicker and smarter decisions, and its conversational AI offers a B2C type user-experience to the end-users.

Zycus helps enterprises drive real savings, reduce risks, and boost compliance, and its seamless, intuitive, and easy-to-use user interface ensures high adoption and value across the organization.

Start your #CognitiveProcurement journey with us, as you are #MeantforMore.

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