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5 BEST PRACTICES FOR A SUCCESSFUL INTERNAL XACTLY ADOPTION

ABOUT THIS GUIDE

By the end of this guide, you will understand the five essential best practices that make the implementation process easier for your company.

5 SOFTWARE IMPLEMENTATION BEST PRACTICES FOR CLIENTS

Your SI partner will lead, manage, and technically implement Xactly. However, you must fully participate to get the most value from your SI partner's experience.

Your company will take the reins during several implementation phases, such as user acceptance testing (UAT), training, and data migration, as well as during the initial outlining of project requirements. Knowing what this entails will help your organization avoid timeline delays while also helping your SI partner create a better product.

1. Create Your Team

2. Prepare Your Data

3. Clarify Your Requirements
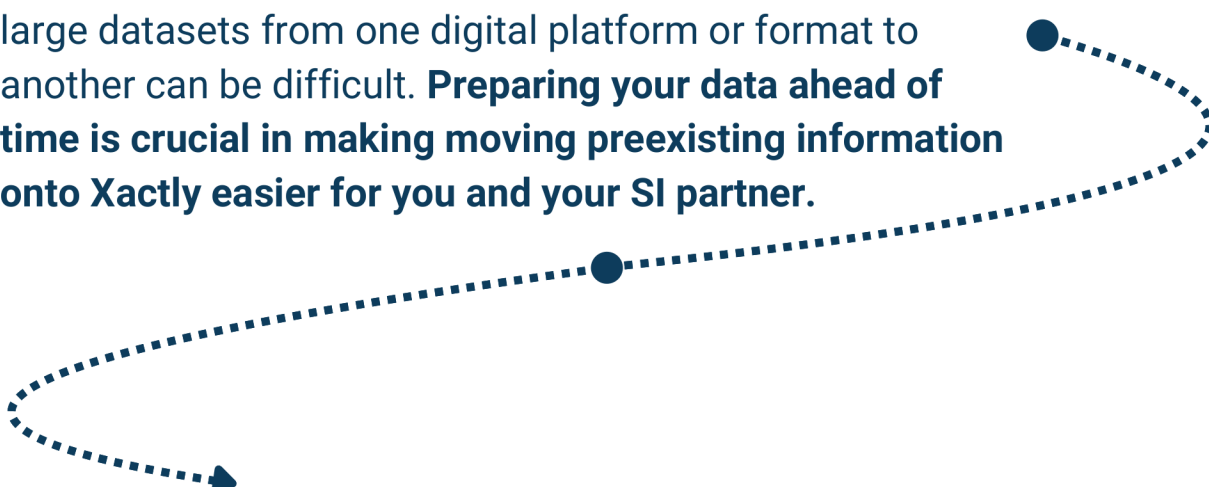
4. Train Early

5. Embrace UAT

Assemble a Strong Internal Software Implementation Team

The first step you should take when planning for an Xactly team is creating an internal implementation team to collaborate with your SI partner and manage project efforts. Your internal team will be the backbone of the implementation process, guiding decision-making, facilitating communication, and ensuring alignment with organizational objectives.

When selecting team members, consider individuals with diverse skill sets and expertise across relevant departments. By harnessing your team's collective knowledge and experience, you can effectively address challenges, capitalize on opportunities, and drive the implementation forward. **By assembling a robust internal team, you lay a solid foundation for a successful implementation and empower your organization to adapt and thrive as you transition into Xactly's platform.**

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Prepare Your Data for Migration

Data migration projects run over time and budget in 80% of cases, with cost overruns typically reaching an average of 30% and time overruns averaging around 41%. Moving large datasets from one digital platform or format to another can be difficult. **Preparing your data ahead of time is crucial in making moving preexisting information onto Xactly easier for you and your SI partner.**

You should complete the data preparation effort before your SI partner pushes the solution into the production environment after testing.

This effort entails administrative tasks, often handled by the sales operations team, to ensure seamless data transfer into the new system. Create user credentials for your SI partner to integrate with your existing CRM systems when applicable to export relevant sales data, such as Closed/Won Opportunities, and ensure compatibility with Xactly.

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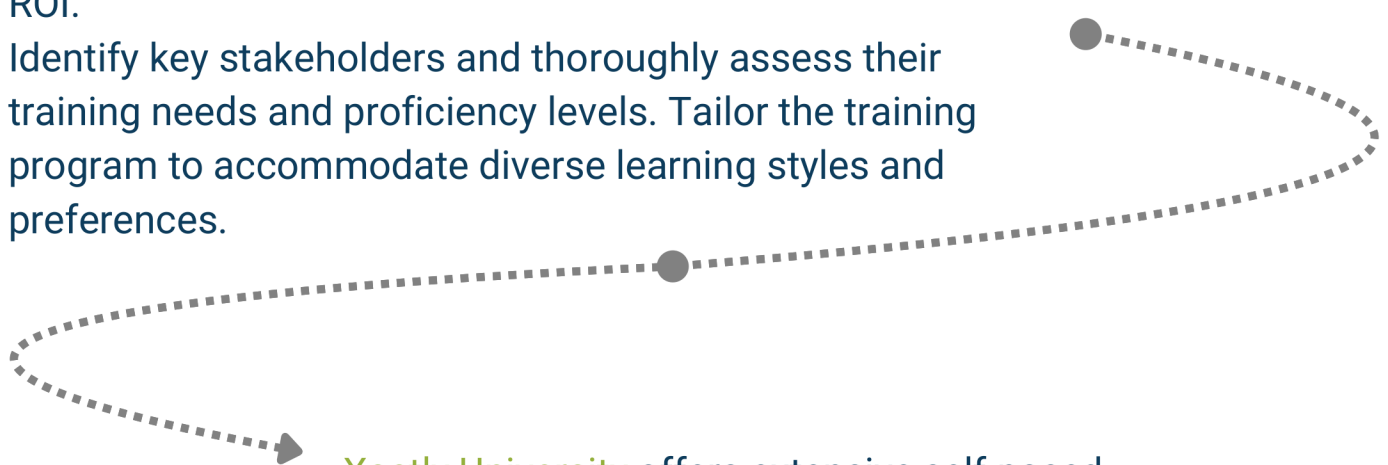# Outline Clear Requirements for Your Software Implementation (SI) Partner

One of the most significant benefits of working with an SI partner is their ability to configure the system to meet your organization's specifications. Central to this benefit is your internal implementation team's ability to clearly define the project goals and subsequent requirements.

Begin by articulating your organization's strategic objectives, operational needs, and desired outcomes for the software implementation. **Collaborate closely with your implementation partner to translate these requirements into a comprehensive project scope, detailing specific functionalities, features, and integration points.** Clarify any technical or business constraints impacting the implementation process, ensuring alignment between expectations and capabilities.

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Start Software Training Early On

[59% of employees believe training enhances their overall job performance](#), emphasizing the importance of internal employee preparation. Training your employees to leverage Xactly's advanced functionalities is critical to increasing ROI.
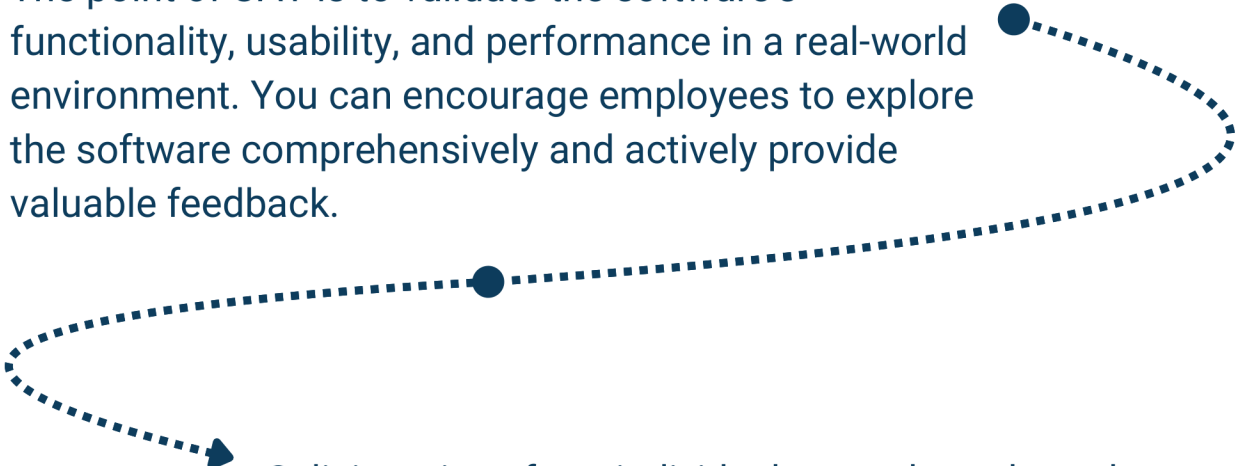
Identify key stakeholders and thoroughly assess their training needs and proficiency levels. Tailor the training program to accommodate diverse learning styles and preferences.

[Xactly University](#) offers extensive self-paced learning options such as digital classrooms, workshops, and [webinars](#). Your SI partner is also an excellent training resource, especially regarding the configured aspects of your solution. **Start the training process early on during the implementation. This timeline will give employees more time to familiarize themselves with Xactly and ensure they're well-versed in the platform before being tasked with testing it.**

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Embrace User Acceptance Testing (UAT)

One of the most important tasks your SI partner needs you to do is test the system. They want your employees, who are ideally already trained to use it, to find any potential issues before the system goes live.

The point of UAT is to validate the software's functionality, usability, and performance in a real-world environment. You can encourage employees to explore the software comprehensively and actively provide valuable feedback.

Solicit options from individual users throughout the testing process and prioritize communicating identified issues to your SI partner to ensure a seamless user experience post-deployment. **The more thoroughly your employees test the system during this process phase, the better the solution will be the day it goes live.**

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Completing a Successful Xactly Software Implementation

Want to Learn More?

learn more about [the blueprint for SPM post-implementation success](#).

Discover [how to fully leverage your SI partner](#)

Learn the [6 key Xactly skills comp admins need to develop](#)

By following the five essential software implementation best practices, you can reduce the friction in the overall process. If you create your internal team, prepare your data, outline precise requirements, start training early, and fully embrace the UAT phase, you are prepared to facilitate a successful implementation.

Knowing what to expect during the implementation helps you craft a solid plan for your organization's role. However, implementation is the beginning of your company's relationship with Xactly. Your employees will use the platform every day. So, it pays to have a thorough understanding of what the implementation will require of you and what to expect after the system goes live.

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