

# Six Steps to Successfully Implementing a Financial Planning Solution

Before choosing a financial planning vendor, make sure you understand their implementation process and the actions they will take to deliver a successful deployment. Review these six steps to guide your conversations:



## 1. Decide

The vendor should ask questions to understand the needs of your business, advisors, and clients.



## 2. Design

Working with you, the vendor should define features, user roles and access, and steps to integrate the new platform with your tech stack.



## 3. Develop

To meet your project's requirements, the vendor should configure and test the software.



## 4. Drive

Ensure your vendor performs user testing that aligns with your project requirements.



## 5. Deploy

To support adoption and drive enterprise value, the vendor should train administrators and users.



## 6. Delight

The vendor should establish a relationship management team to ensure the implementation continues to support your goals.