

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.