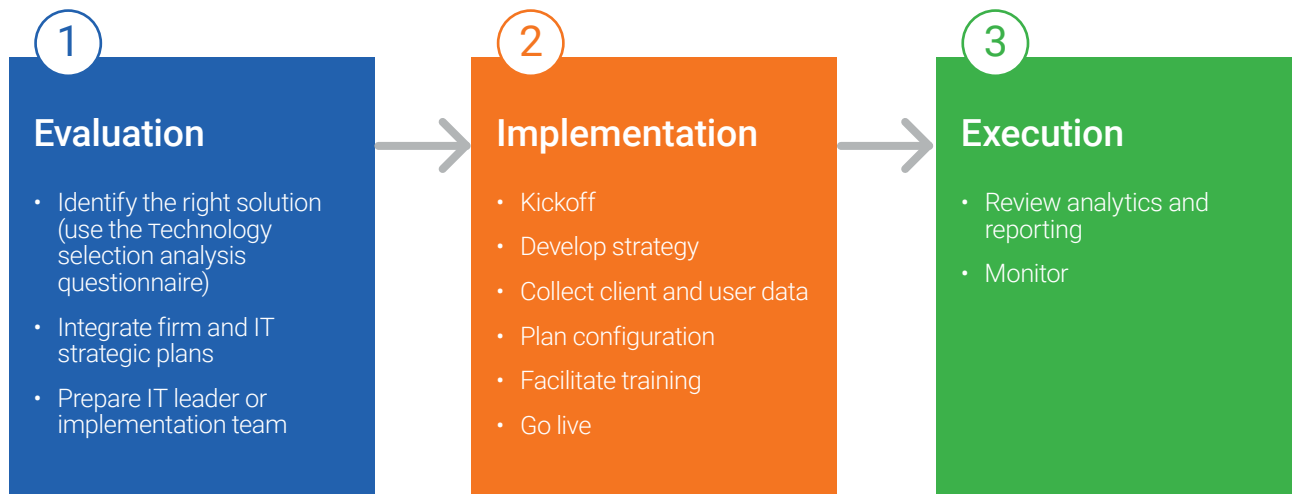# FIRM *inMOTION*

Sample implementation roadmap

Identifying the need for a new technology solution is just the first step, but the idea can be successful only if acted on. Like any large-scale initiative, building a proper project plan is the foundation for long-term success.

Before getting started use:

- The IT strategy template to document the firm's IT objectives, strategy and measurements

- The IT governance checklist to align the firm and IT strategic plans

- The IT budget calculator to set firm technology cost expectations

- The Best practices checklist and/or Innovative practices checklist to identify new solutions needed to be a high-performing firm

This roadmap illustrates the best practices for firms to consider through the full life cycle of project implementation from evaluation through execution.

1 Evaluation

- Identify the right solution (use the Technology selection analysis questionnaire)
- Integrate firm and IT strategic plans
- Prepare IT leader or implementation team

2 Implementation

- Kickoff
- Develop strategy
- Collect client and user data
- Plan configuration
- Facilitate training
- Go live

3 Execution

- Review analytics and reporting
- Monitor

This roadmap is scalable, depending on the size of your firm. Firms with 10 or fewer people may be able to execute each step quickly and easily since a team of 4–5 often is working side by side daily. Conversely, larger, multi-location firms looking to implement a new technology solution across departments may need to be more deliberate to ensure each step is considered, especially in the evaluation process.

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This roadmap was derived from ideas presented in AICPA and XCM's How Workflow Technology Can Transform Your Accounting Practice publication.