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New to procuring SaaS?

This playbook is designed to provide you guidance on how to procure, and what essential things to look for when choosing your tech stack.

Data security

If you have a Data Protection Officer, Security Officer or Information Governance Manager in your organisation you may want to consult with them to ensure that the software you choose will meet their standards and aligns with their strategy. Some of the areas you will need to review as part of the purchasing process include:

- The Data Protection Act and GDPR
- The Public Records Act
- The Freedom of Information Act

If you are part of the UK public sector, you will also need to consult:

- Security Policy Framework
- Minimum Cyber Security Standards
- Data Protection Impact Assessment

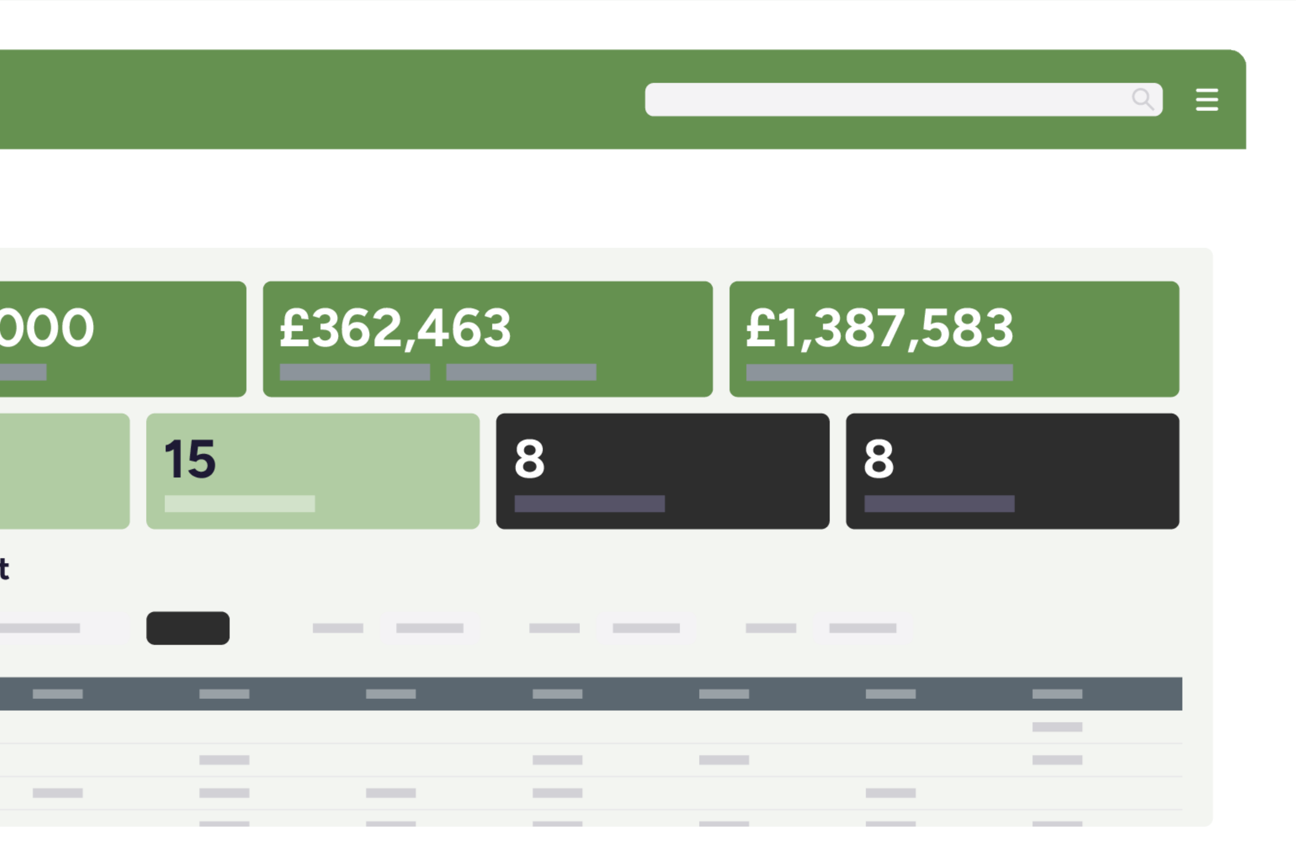
There are different ways of measuring compliance but some of the things to look out for include:

- Cyber Security Essentials Plus
- ISO270001
- NIST/NCSC
- Whether data is held within the UK and how
- High availability (99.95% up time)
- Service Attack strategy
- Full redundancy
- Pen tests

Minimum things you should look for

- Tools that allow you to sign in using HTTPS.
- Safe process for retrieving and removing data.
- Ability to track activities and when information was used, amended or deleted.

Configuring your software



- Integrate it with your existing identity systems with Single Sign-On (SSO).
- Spend time setting up user profiles and access permissions.
- Decide if any integrations are required to support more effective working.
- Decide whether access has to be via a work device.

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Ensuring a successful

Roll out

The importance of data

Data as a foundation

High-quality data is crucial for the success of any SaaS implementation. The effectiveness of the new software largely depends on the data it uses and processes.

Data strategy

Develop a robust data strategy that includes:

- **Data Governance:** Establish clear policies for data ownership, management, and usage.
- **Data Quality Assurance:** Implement processes for data cleansing, validation, and maintenance.
- **Data Accessibility**: Ensure that data is easily accessible to relevant stakeholders while maintaining security protocols.

Ongoing data integrity

- **Regular Audits:** Schedule regular data quality audits to identify and rectify discrepancies.
- **User Training on Data Entry:** Provide training on the importance of accurate data entry to all employees who will interact with the system.
- **Automated Validation**: Utilise automated tools to flag inconsistencies or errors in data entries.

Pre-roll out preparation

Needs assessment

- Conduct a thorough assessment of existing processes and identify gaps that the SaaS product can fill.
- Engage stakeholders from different departments to gather diverse insights.

Stakeholder buy-in

- Present the benefits of the SaaS solution to all levels of the organisation.
- Create a clear value proposition that aligns the SaaS capabilities with organisational goals.

Budget planning

- Outline the total cost of ownership, including subscription fees, training, and potential customisation costs.
- Allocate funds for ongoing support and maintenance.

Policy alignment

Review existing policies

Assess current internal policies to ensure alignment with the functionalities of the new Saas product.
Identify any policy updates required to integrate the new system seamlessly.

Create new policies

Develop policies for data access, usage, and security that reflect the requirements of the new SaaS product.

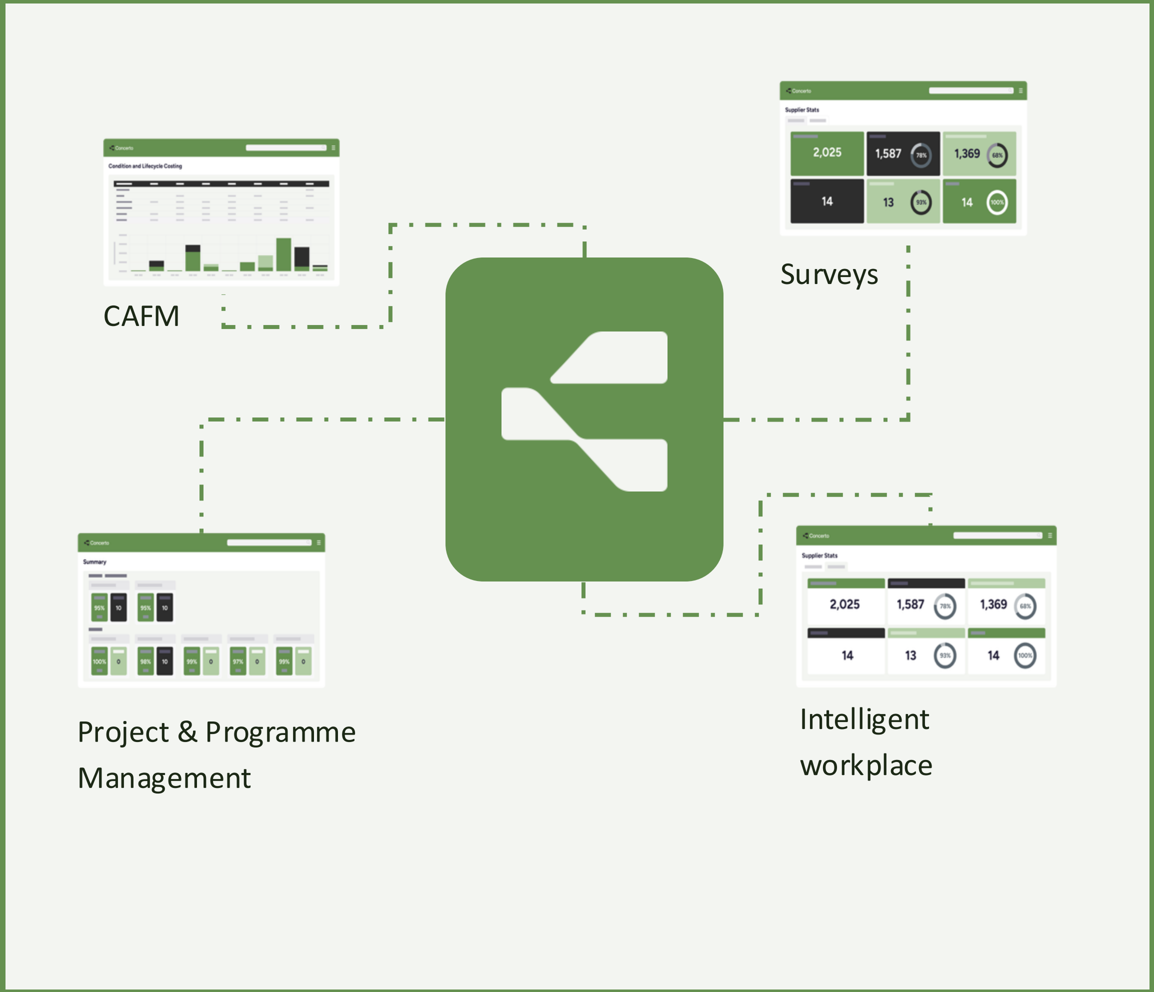
Ensure policies promote best practices in data management.

Communication of policies

Communicate new and updated policies clearly to all staff members.

Provide access to a centralised repository where employees can review these policies.

Configuration of the SaaS product



CAFM

Surveys

Project & Programme Management

Intelligent workplace

Customisation

Work closely with the SaaS Vendor to tailor the software to reflect current business practices and workflows.

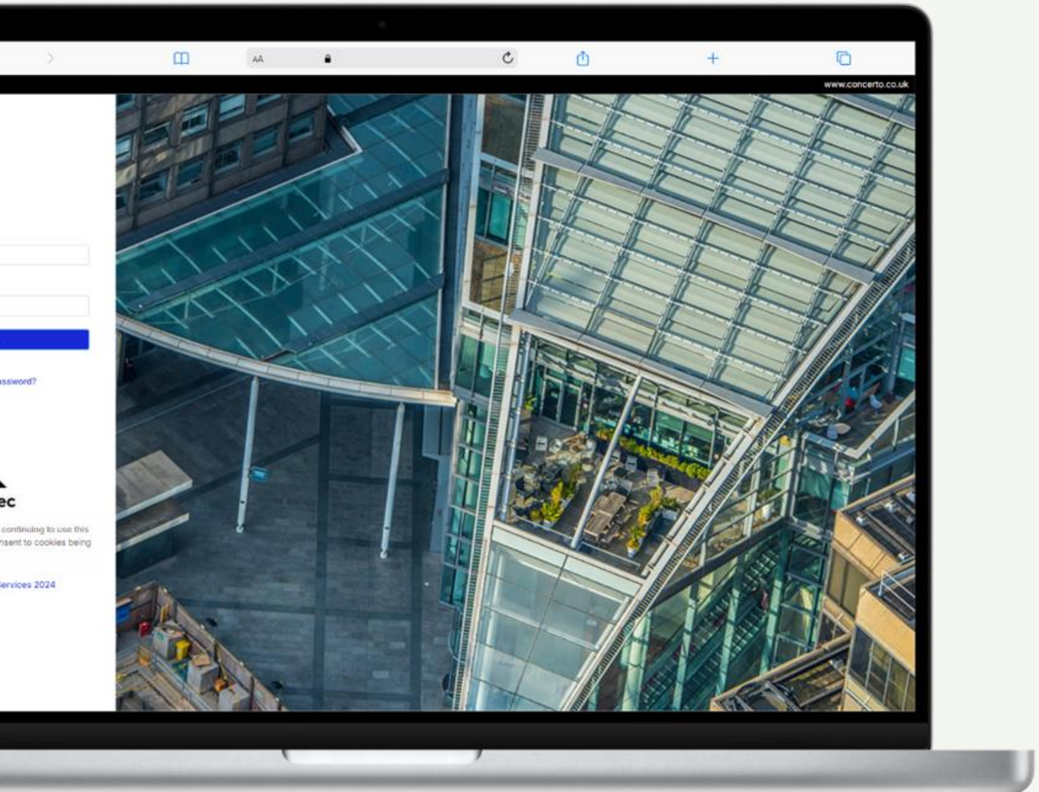
Ensure that the configuration supports user-friendly experiences and simplifies processes.

Integration with existing systems

Plan for integrations with existing systems (e.g. CRM, ERP) to enable seamless data flow.

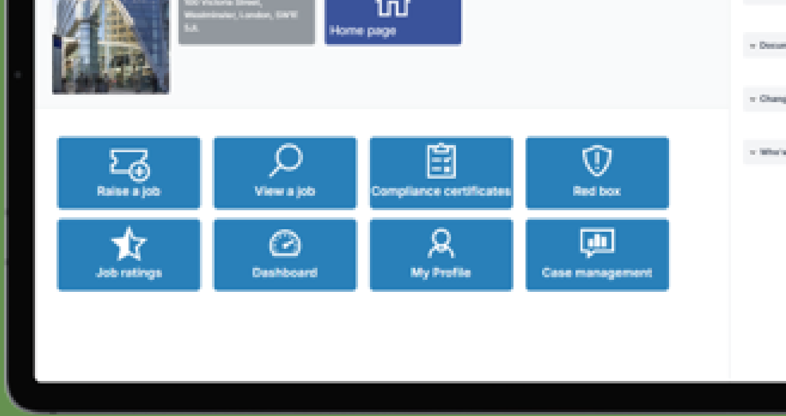
Use APIs or middleware as necessary to facilitate communication between systems.

User acceptance testing (UAT)



- Conduct UAT to ensure the system meets user needs and aligns with current practices
- Gather feedback during UAT and make necessary adjustments before full deployment
- Training and Change Management.

Identify training needs



Assess the training requirements for different user groups based on their roles and responsibilities.

Develop tailored training programs that cater to varying skill levels.

Training delivery

Utilise a mix of training methods, including workshops, online courses, and one-on-one coaching.

Schedule training sessions well in advance of the rollout to give users time to adapt.

Change management strategy

Establish a change management team to support the transition to the new system.

Create a communication plan to keep all stakeholders informed of the rollout progress and updates

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Book a session with us today

01925 989 500
hello@concerto.co.uk