



Grants Management Solutions Toolkit: Preparing for Implementation

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In a previous [article](#), my colleague Rachel Bennett gave an overview of how you can examine the processes your organization has in place in order to improve your [performance reporting](#) capabilities. She recommended aligning your processes and workflows with your goals and objectives and gave some tips on how to map out what your existing processes are so you could imagine how they could be improved. Ultimately, [implementing technology](#) is one way to help you streamline your organization's processes. While it isn't always easy in and of itself, technology can certainly make grants management a much more streamlined endeavor.

The AmpliFund Delivery Team I lead has executed many successful implementations for clients ranging from small nonprofits with only a few grants being managed all the way to highly complex State Agencies. I wanted to give you some practical tips when it comes to planning for your grant management software implementation, so it goes smoothly from the get-go.

Implementations vary by industry and organization. There are a lot of factors that go into planning how long a client's implementation will realistically take. Some factors include the size of your organization, the number of unique opportunities or awards you're managing in the system, and especially the time your organization is willing to commit to implementation and training. For example, AmpliFund can take as little as three (3) months or as long as nine (9) to implement.

Here are some factors to consider when you're planning your implementation timeline. Your grants management software partner can use this information to help plan your official project plan later on. We can start by doing some "requirements gathering." You'll hear that phrase a lot during your implementation, so let's start using it now.

Program Considerations

How many programs do you want to manage in your grant management system?

Start by building out a spreadsheet listing your programs. While a GMS can eventually help you eliminate spreadsheets for managing awards, this particular spreadsheet will pay dividends down the road during implementation, and you and your software partner will be glad to have it. You'll want to document the following:

- all award start and end dates
- parties involved with this award
- grant manager
- description of the project
- current status

Make an entry for each award and document more than you think you'll need to. This is how you'll be able to clearly see your organizational needs, determine how many users you'll need to train to use the system, and what kind of timeframe your implementation will need to fit into.

Organizational Considerations

How much time will be needed for internal discussion and project management?

Allocate time internally for collaboration and discussion into your timeline. Clients often underestimate how much goes into an implementation. An implementation is a lift for your software partner, but it is also a relationship where organizational input is required for a successful implementation. Training alone is not enough, and you'll want to be sure to allot time and resources for your team for configuration and homework.

What is your typical grant calendar?

Comb through previous calendars to identify peaks and valleys of busy times. Find a time of year that is commonly less hectic to begin any process changes that can come along with an implementation.

What approvals are needed at each stage in the implementation process?

Map out the decision hierarchy for each stage of the process so you know how to plan around these approvals.

Software-Related Considerations

How will the organization integrate or transfer data from its current system?

In most cases, this can be done through a series of imports using a template to map data to specific software fields. You'll need to know what data you plan to migrate over, what format it is currently in, and where it is currently located. Data migration is one area of an implementation where you'll want to work closely with your software partner to ensure they have what they need from you so you can get what you need from them.

Do you have any other software that the system needs to integrate with?

Integrations can be as straightforward as an Outlook integration or as complicated as a financial management system. Will there need to be any development associated with integrations, or are they turn-key? Ensure you've had discussions internally about what your integration needs are specifically, and make sure these are communicated to your software partner.

Training Considerations

Who will need to be trained on the new system?

Identify any employees or external stakeholders who will need to know how to use the system. Typically, internally this group consists of the grant management office and any other personnel who handle grants, budgets and finance.

How does your organization plan to rollout the software?

Consider a [pilot program](#) to rollout new processes to select employees. Once that runs smoothly, implement organization wide with two or three specifically chosen grants to help the full team learn to use the system.

Team Considerations

Who will lead the implementation process as your Implementation Leader?

Your Implementation Leader should be the person with final accountability for grant-related data, whether that is performance data and/or financial data. It's great if this person is also organized, tech-savvy, and willing to learn and ask questions.

The Implementation Leader should have a clear and documented plan of how they envision the rollout of the software itself and any potential related process changes to the rest of the organization. They should be a good communicator who won't shy away from conveying the rollout plan both internally and to external stakeholders.

Who will support the implementation as a member of the implementation team?

The ideal implementation team is a balance between grants subject matter experts, people that know what the organizational pain points are (and ideally how they became pain points), and those who are open to change.

A key position on the team will be a Change Management Lead. This is an incredibly important role on any implementation team. This person should be filled by someone who is a leader, even if they are not in a leadership position in your organization. This should be a person that people in your organization respect and listen to.

Ideally, you will want to find an executive sponsor as well. This is someone within the c-suite who will act as your internal champion and advocate.

Planning Your Timeline

After you've considered all the relevant factors and identified your team members, you can make an [implementation timeline](#) of your own.

An implementation timeline is a working document that lists activities, associated and responsible individuals, and the estimated time for task execution. The timeline may include costs, expected obstacles, and your objectives.

Here's an example of what your implementation timeline document could look like:

Grant Management Implementation Timeline		
Implementation Tasks	Estimated Time to Complete	Dependencies
Configuration & Set-Up		
Staff Training		
Other Steps		
Total Time (in hours)		

This table will be incredibly valuable to your organization, and to your software partner. One of the best tips I have for you when it comes to preparing for a grants management software implementation is this:

Have more information on-hand to start than you think you'll need, and make sure it is documented and communicated to your technology partner.

Implementations are a big organizational undertaking, but by being prepared and choosing the right partner, yours is much more likely to be successful.

To learn more about how grant management software can help your organization streamline your processes, schedule a demo today.

Schedule a Demo



AmpliFund

AmpliFund is the leading purpose-built grant management platform designed for federal, state, local, and tribal governments to manage every phase of the grant management process. Our configurable solution provides a full suite of features needed by grant funders and recipients to maximize grant outcomes, meet performance standards, and increase compliance so they can achieve their missions.

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