



# SaaS UPDATE CHECKLIST

In SaaS-based systems, you are no longer planning your upgrades; you are preparing. Previously you would set an upgrade plan, establish the proper protocols and take the time you needed to schedule accordingly. Here are a few tips to help keep your mind from scrambling.

## DEDICATED TEAM

- This team should include Software as a Service (SaaS) project roles to configure, monitor, troubleshoot and administer applications. Also included should be Subject Matter Experts (SMEs), End Users for testing, and an engaged Project Sponsor. It is critical to the success of your project to get the right players involved from the beginning to provide Project Oversight or Leadership, Governance, and Accountability (LGA).

*This is where a neutral third party can be of great assistance in leading your team, by providing an experienced Project Leader who holds all stakeholders accountable and ensures contract alignment.*

- The Project Sponsor should be heavily invested in the project, so you have top-down support to drive success and stakeholder involvement. The absence of this support can be the cause of failure.

## ADEQUATE PREPARATION

- Be certain your current processes have been reviewed and are validated.
- Begin thinking about system configuration. Are there new areas you can utilize now that were not part of the prior version?
- Ensure the business and IT teams are regularly evaluating costs and spending such as monthly license fees.
- *If you choose to implement new functionality, make sure you update processes and complete change management. (Note: this does not need to happen at the same time as the update)*

## PROPER PLANNING

- Maintain a renewal calendar for notifications on renewal dates.
- Know the update schedule; walk backward to create a realistic project plan.
- Socialize updates and any new features to keep teams informed.
- Plan for execution and testing, ensure you get the right people in the room.

## SUFFICIENT TESTING

- Write test scripts and use cases based on real life scenarios that occur on a daily, monthly, and yearly basis.
- Make sure you are testing end-to-end and through all integrations.
- Can your users say the following with certainty? "I am confident that I can perform each of my applicable job duties within the new system."
- Setup end to end automation test scripts to improve quality and efficiency of testing.

Contact MSS Business Transformation Advisory to help your organization prepare for the next SaaS upgrade.

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