



Software Vendor Transition

(Without losing your mind)



Know Your Why

Don't just switch vendors because the sales rep sent you muffins. Be clear: is it cost savings, better tech, or simply because the old vendor ghosted you on support? Map out what's in play (systems, data, processes) and set goals that can be measured — not just "make things better."



Test Drive First

Don't hand the car keys over before a spin. Use a sandbox, try breaking it, and see if it plays nice with your systems. Collect honest feedback — especially from the folks who actually use it daily.



Spot the Gaps

Line up Old Vendor vs. New Vendor like a prize fight. What features are missing? What integrations will make your IT team sweat? Write down the risks now — your future self will thank you.



Move the Data (Carefully)

Map out the fields, scrub your data (nobody wants "John Smith" in the new system), and test with a small sample. Automated scripts where possible. Use a computer, not a pencil.



Play Defence

Every transition has villains: downtime, cranky users, data loss. Build a risk plan that says "we see you" — backups ready, workarounds mapped, and someone actually assigned to watch each risk like a hawk.



Teach, Don't Preach

People fear change more than spiders. Offer training that's practical, not painful. Give them guides, workshops, and real support (helpdesk or Slack channel) so adoption isn't a nightmare.



Guard Your Treasure Chest

Before moving house, pack your stuff. Catalogue data, configs, licences, integrations. Back it all up like your career depends on it (because it might). Oh, and make sure regulators don't get cranky — GDPR and HIPAA aren't just alphabet soup.



Go Live — With a Parachute

Pick a smart time to flip the switch (not Monday morning at 9). Monitor performance closely. Keep your rollback plan handy in case things implode.



Rally the Troops

Get leadership on board (executive sponsors make things happen). Loop in IT, ops, finance, and end users early. Share timelines, expectations, and maybe cookies — people like cookies.



Look Back, Move Forward

Don't high five and forget. Look in the rear view mirror, then floor it.

