

HOW TO HAVE A SUCCESSFUL ACCOUNTING SYSTEM UPGRADE

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A change to an organization's accounting system is no small task. Whether the change is chosen or forced, it provides the rare opportunity to review how an organization operates and make changes to operate more efficiently. Consider the following to ensure a successful upgrade:

- Enlist the help of key employees at various levels to be part of the software selection and conversion team. They are in the best position to make sure all key items are considered.
- Develop an initial wish list of items that you want to achieve through this conversion as well as non-negotiable requirements.
- Find out which software packages are most prevalent in your industry and have an initial demonstration.
- Revise both the wish list and the non-negotiable list based on the initial software demonstrations.
- Have your finalists demonstrate how the upgrade will achieve the items on your lists.
- Make sure your computer hardware can operate the new software and include any software upgrades into your equation.
- Be open to changing your current processes to best utilize your new software's capabilities.



If you have questions about this or any other business or tax issue, please do not hesitate to contact your Conner Ash Account Executive or [Robert Klutho, CPA](mailto:Robert.Klutho@connerash.com), at (314) 205-2510 or via email at bklutho@connerash.com. Thank you.