



Accounting Management System Software Services Action Items

Conduct Initial Needs Assessment

Schedule meetings with key stakeholders to identify specific accounting needs and challenges.

Gather requirements for software features, reporting, and integration.

Research and Select Software

Evaluate potential AMS software options based on identified needs.

Present recommendations to stakeholders and facilitate the decision-making process.

Plan Implementation Timeline

Develop a detailed project timeline outlining key milestones and deliverables for the implementation process.

Assign responsibilities to team members for each phase of the project.

Data Migration Preparation

Review existing financial data and clean up any inconsistencies.

Prepare a data migration plan to ensure secure and accurate transfer of information.

Software Installation and Configuration

Coordinate with the software vendor for installation and configuration.

Customize the software settings according to business requirements.

Integration with Existing Systems

Identify other business systems that need to be integrated with the AMS (e.g., ERP, CRM).

Develop an integration plan and execute the necessary connections.



User Training Sessions

Schedule training sessions for all relevant team members.

Create training materials and resources to facilitate learning and adoption.

Launch and Monitor

Go live with the AMS and monitor initial performance closely.

Address any immediate issues or questions from users promptly.

Establish Ongoing Support Mechanisms

Set up a helpdesk or support channel for users to report issues or ask questions.

Assign team members to oversee ongoing support and maintenance.

Review and Optimize

Schedule regular review meetings to assess the AMS performance and user feedback.

Make necessary adjustments and updates based on user experiences and business needs.

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