SWITCHING
PHA SOFTWARE
MADE EASY

10 SIMPLE STEPS FOR SUCCESS

emphasys
SOFTWARE

SWITCHING PUBLIC HOUSING AUTHORITY (PHA) MANAGEMENT SOFTWARE CAN BE A COMPLICATED AND DIFFICULT UNDERTAKING. It requires many moving parts and, depending on the size of your Agency, many different departments.

Before making any decisions about changing your software, you naturally want to have all of the information about a potential new software platform so you can make the best decision possible for your organization.

The research phase and decision-making process isn't always easy though, so we developed these 10 steps to help you determine if the new system you're considering is the best fit for your PHA. This guide will walk you through your research phase and give you simple steps to make the process a successful one.

Step 1: Kick The Tires

The first step is to recognize that you are not committing to changing anything until you go out for bid. You should be looking around and seeing what's available before making a software decision. Having a small but meaningful group of options is key.

Make sure you find out how the new technology works with the features that you will use the most. For instance, will the software allow you to manage and streamline your day-to-day processes for low rent, HCV, RAD, MTW, Multifamily, inspections, waiting lists, accounting, and reporting? Ask yourself what modules are most important and which features you don't necessarily need. Keeping track of differences in various products can be a good way to compare all of your options before committing.

Step 2: Get Estimates

Now, determine estimates for what you're going to be spending on the new product. Questions that you can ask potential vendors about their software product include:

- ▶ How much will the total cost be?
- ▶ Are there any annual fees?
- ▶ Will you have to pay for upgrades?
- ▶ Will you need to pay extra for support or custom programming?
- ▶ Do you offer a hosted solution and what is the cost difference?

Having potential vendors answer these questions will allow you to compare pricing and features for the software product. Establishing a budget that you're willing and able to spend on a new product can help you to compare pricing between vendors. This will also help to narrow down your software selection to determine whether or not a vendor's product is the right choice for your PHA.

Step 3: Look Out For Your Existing Custom Programming

Identify any custom programming that you are currently using. We recommend creating a checklist of unique features that your original vendor created for you. It may be that you will want to continue to use your custom programming processes, so you are going to want to ensure that this functionality is preserved when you switch to your new software. Otherwise they will be lost when you transition to a new vendor, or even a new product with your current vendor.

If you do end up losing custom programming, make sure that you notify the new vendor when you upgrade to their software product. Most vendors should be able to add the custom programming or feature that you need. This is where it can be helpful to know if you will need to pay a fee for custom programming that is added to the software.

Step 4: Determine Their Experience With Conversions

The fourth step is to find out if the vendors you're looking at have converted from your specific system before. If the vendor is only capable of converting some of your data, like 50058 information, then here is very little that you can actually gain. You likely have so many different types of data in your current system, far beyond just 50058. You want to ensure that your new vendor can convert all of this information so you never skip a beat. Finding a vendor who is capable of migrating most of your existing data will save your PHA many hours of manual data entry.

Find out from the vendor what their experience is with conversions. The more data migrations they have done from your existing vendor to the new platform will be a key factor for the future success of moving software.

Step 5: Check The Product's Longevity

Ask the vendor how long their product has been out on the market. Products that have only been out for a few years should be viewed with caution. Remember that you will be relying on this software to run your day-to-day operations, and selecting one that is in its infancy could bring you performance problems as the vendor works out the bugs.

We recommend a benchmark of five years when looking for a new software product. It is less likely that a product that has been out for five years or more will bring you major problems because it has been developed and tested and should be trusted within the industry.

Step 6: Be COVID-Cautious

Due to the COVID pandemic, PHAs are relying more on self-service portals which promote social distancing and less in-person interaction. You will need to ask any potential vendors if they offer self-service portals for their software product in order to help protect those associated with the PHA.

Since the health of your PHA staff, applicants, and residents is a top priority, PHAs are looking for ways to move services online which helps lower the chance of infection. All applications, certifications, and payments can be done online if you have the right program with a self-service portal. In order to serve your applicants and residents in the best way, a self-service portal is a must.

If your PHA is depending on a portal right now, you need to ensure you're going to be able to replace the portal when you move to a new product or system. Vendors should be able to switch your existing portal over to a similar portal in the new system. This can save your PHA staff, applicants, and residents time as they will be familiar with the need the portal is filling.

Step 7: Consult Others In Your Field

Oftentimes it can be useful to get feedback from others in your industry about a software product. If the new vendor can give you a list of agencies in your area who are using their product, you can check in with them and find out what their experience is like with that vendor and product.

Consulting with other agencies that use a vendor's product can help you to collect more information as well. This should help you to narrow down your product choices as well as determining whether the product can do all of the things that you'll need it to for your system.

Step 8: Check How The Product Has Been Future-Proofed

The eighth step is to make sure that the vendor has easy exporting capabilities of the data in your system, just in case you decide to move to a new system within three to five years. You should also find out if the product has easy report-writing capabilities. For instance, is it compatible with Excel, Word, Power BI, etc. You should also ask important questions like "Can my PHA create a Microsoft Excel report and tie it directly to the database?"

As far as moving to a new system, the data in your system belongs to your PHA and should be accessible to you should you wish to switch vendors. Proceed carefully and ask your new vendor how they handle your data, as there have been some reports of providers locking customers out of their data once they hear they are switching to a new vendor. Dealing with this question up front can help to alleviate worries about a data hostage situation later and allow you to be confident in the ability to change systems later on should you choose to do so.

Step 9: Find Out If You Have A History

Ask your potential vendor if your PHA has ever been a client with them before. If the answer is yes, then there may be perks in it for you. Some vendors may provide you with free software, free conversion, or even the possibility of being the sole source thereby avoiding the cost of going out for RFP.

If your PHA has a previous connection with the vendor, you'll want to make sure that you take advantage of any past features. This can be extremely helpful to you and the software product you choose.

Step 10: Look For How They'll Support You

The last step is to make sure the software vendor focuses on education and on-going training. Some vendors may charge extra for additional training and support, which can be costly over time if you need to keep training new staff on how to use the software.

You don't want to be stuck with an extra bill down the line because you chose a vendor who doesn't provide any extra support. Asking the vendor about what training courses they have on the software or what educational material/content you can receive after you switch to their product can help you to get a feel for whether or not the vendor wants to help you learn about their product properly.

Finding the Right Solution

When it comes to choosing to convert to a new product or vendor, it's easy to get caught up in all the shiny new features that you may receive. Selecting a software product should take time as you look around at your options, and you shouldn't commit to anything until you get all the facts. It's important to have a list of what special programs or features you will need to use in the future, create a budget for how much you're willing to spend, and ask potential vendors important questions about their product's longevity, features, and pricing, as well as the vendor's experience with conversion, support, and on-going training.

Following these 10 steps will ensure that you're narrowing down your software options to the best solution possible for your PHA to successfully serve your applicants and residents.

Are you ready to make a change in your PHA software vendor? We're here to help.

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