FORM & FUNCTION

IN PARTNERSHIP WITH Kantata

PRE-IMPLEMENTATION READINESS

Your Quick Pre-Implementation Checklist for Kantata

Assess your organization's readiness before you start configuration with these 10 questions.

Kantata's capabilities can help your firm run more efficiently and make better decisions, if it's automating processes that work as they should. But automating before you're ready undercuts your investment.

Getting visibility into your organization's readiness can be a challenge when you're in the middle of it. These are the questions that we ask as Kantata-approved partners to create a clear readiness snapshot.

HOW TO USE THIS CHECKLIST

- Check each box only if the answer is an unqualified "yes" right now.
- Answer the questions with your leadership team for complete input and to see where perceptions differ.
- Total your "yes" responses to see your stage and next best steps.

The checklist

- [ ] 01 **Does your organization have a documented workflow?**

  It's a yes if: Your organization has an agreed-upon, written path from lead through opportunity, project, delivery, invoice, **and** recognized revenue, without having to rely on workarounds or exceptions.

  Why this matters: Without solid documentation, workflow automations get configured incorrectly or incompletely.

- [ ] 02 **Does everyone define your organization's operational data the same way?**

  It's a yes if: Your company has written, shared definitions for resource roles, billable and non-billable time, project types, revenue categories or service lines, utilization calculations, **and** margin calculations.

  Why this matters: Working from standard definitions allows Kantata to generate reliable, consistent data.

- [ ] 03 **Is your pipeline reliable enough to support capacity planning?**

  It's a yes if: Your company's pipeline includes standardized opportunity stages, probability definitions, expected close dates, planned start dates, **and** estimated effort.

  Why this matters: Without trustworthy pipeline data, resource planning becomes reactive.

- [ ] 04 **Do you know how you'll forecast revenue?**

  It's a yes if: Your organization has agreed-upon, written practices for evaluating secured booked and backlog revenue, weighted and unweighted pipeline, and resource capacity — **and** you have a designated owner for forecasts and the data they reference.

  Why this matters: Standardized forecasting and ownership shape how reporting dashboards need to be configured.

- [ ] 05 **Does leadership agree on how resources will be managed?**

  It's a yes if: Your organization has a defined allocation process, hiring triggers, bench management, capacity planning cadence, **and** role ownership.

  Why this matters: Technology doesn't solve resource management. It enables the process you've already defined.

- [ ] 06 **Are your project delivery processes consistent?**

  It's a yes if: Your organization has standardized processes for project setup, staffing, budget management, change requests, financial reviews, **and** reviews of project and client health.

  Why this matters: Inconsistent delivery processes create inconsistent data.

- [ ] 07 **Have you defined the KPIs leadership will use to manage the business?**

  It's a yes if: Your leadership team has identified the metrics they need to evaluate the firm's performance, including forecast accuracy, gross margin, billable utilization, backlog coverage, pipeline coverage, project health, and delivery margin.

  Why this matters: Your leaders need the KPIs that fit your business, not simply whatever's available out of the box.

- [ ] 08 **Do you know where your data comes from?**

  It's a yes if: Your organization is clear on which systems Kantata will access, including your CRM, HRIS, accounting, payroll, time tracking, and spreadsheets.

  Why this matters: Good reporting depends on good operational data.

- [ ] 09 **Have you established governance?**

  It's a yes if: You and your leadership team have the names of the people in your organization who own the data, maintain it, review it, **and** approve changes to it.

  Why this matters: Kantata succeeds when accountability extends beyond the implementation team and your governance is consistent.

- [ ] 10 **Have you planned how people will adopt new ways of working?**

  It's a yes if: Your organization has defined change management plans for leadership expectations, operating cadence, reporting reviews, communications, training, **and** ongoing process ownership.

  Why this matters: Successful software adoption follows operational discipline, not the other way around.

How ready is your firm to implement Kantata?

Add up your “yes” answers.

8–10 **You’re ready for a successful implementation,** with most or all of the necessary operational disciplines in place.

Form & Function helps implementation-ready organizations like yours to fine-tune workflows, reporting, governance, and AI to help you realize the full strategic value of your Kantata investment.

5–7 **You’re at the pre-implementation design stage.** This is where most firms find themselves as they consider professional services automation. Firms like yours typically have the pieces in place, but inconsistencies in processes, data quality, reporting, or governance can limit platform adoption and reduce confidence in results.

Form & Function works alongside leadership teams at this stage to close gaps before implementation, so you have a cleaner deployment, get better reporting, and realize faster time-to-value.

0–4 **Your biggest opportunity now is operational readiness.** Addressing underlying operating-model inefficiencies now will lay the foundation for consistent processes and reliable data when you automate.

Form & Function helps leadership teams at firms like yours establish the workflows, governance, and data standards that create the foundation for a successful implementation and a stronger business long after go-live.

Most implementation partners focus on configuring Kantata. We help leadership teams prepare the business first.

Before implementation, we work with services organizations to:

- Design operational workflows
- Define executive reporting and KPIs
- Improve data readiness and quality
- Establish governance and operating cadence

The result is a Kantata implementation that reflects how your business should run, not simply how the software works. This mirrors the philosophy behind our Kantata Advisory engagement, which evaluates operational workflows, governance, reporting, and platform readiness before implementation begins.

Reach out to learn more about how Form & Function Consulting can help your move to Kantata.

Contact us