



The payment provider playbook: How to successfully prepare your team for a platform integration

A Currencycloud ebook





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A smart investment

Integrating with a third-party payment solution is a smart investment for businesses looking to streamline their payment operations, improve internal functionality, provide a better customer experience and pave the way to seamless cross-border expansion.

Still, preparing your people for payment platform implementation can feel like an overwhelming task. From a technical standpoint, integrating with a third-party payment solution should be a fairly straightforward integration. But successfully championing any operational change in your organization involves more than managing tech alone.

To make the most of your payment platform investment, it's important that you communicate with your team at every juncture to align your payment solution and implementation process with their needs and the long-term goals of your company. To help guide your efforts, we've broken down our implementation process as it relates to each team in your organization, so you can lead an informed and productive discussion around integration and prepare your team to reap the greatest benefit.

Preparing for a platform implementation by department

Before you can begin to implement a payment platform, it's important to understand your payment needs, goals, process and current functionality within the context of each department within your organization. Understanding these things up front will help your third-party payment provider tailor your solution to meet the operational requirements of your entire company, and will ultimately streamline implementation by ensuring universal buy-in. Your provider should work closely with your organization to determine a relevant project scope, define actionable goals, identify functionality gaps in your current process and set a realistic timeline for implementation. But what should that conversation entail for each department?