Real-Life Lessons: How to Avoid Common and Costly Mistakes When Implementing Technology

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Barker & Scott Consulting

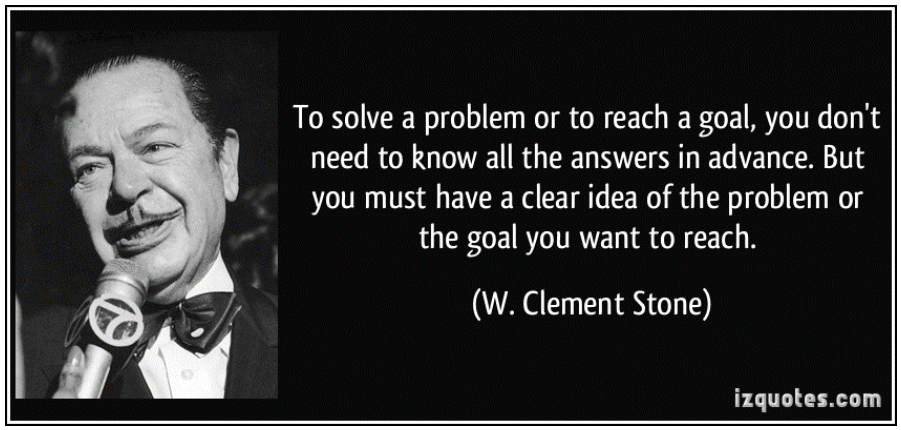
- www.barkerandscott.com
- Barker & Scott is a ten year old firm that specializes in helping nonprofit organizations to identify, understand, and leverage their major constituencies for operational and mission success.
- We are 100% vendor independent.

Objective

In our various roles we have been fortunate enough to have been successful implementing a number of complex technology-based projects.

At the same time, we have also made almost every mistake possible. We will discuss with you what worked and what did not work.

Know what problem you are solving



- Make sure you work with a broad group of people to create a clear statement of what problem(s) a project is going to solve or what opportunity a project is going to help the company exploit.
- Also, create a clear and measurable definition of success for the project.
- Finally, document any conditions that if met would cause you to cancel the project.
- Document all of this in the project charter and get EVERYONE to sign it.

New technology is cool, but people, processes, and good data are cooler

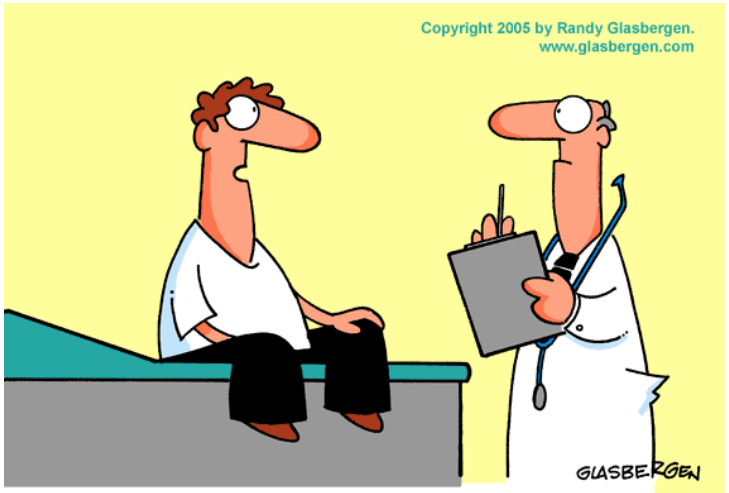
- As technology has become more accessible at home, people have forgotten how hard it is to implement in the enterprise.
- As a result, less and less attention is being paid to process redesign and people.
- Unfortunately this usually results in the lowest form of project success: platform transition.
- Ensure you have strong business analysts on your project team and listen to them.

The combination of unrealistic expectations and magical thinking often results in disaster

Pick Two!!!

- Tight deadlines and budgets are always going to exist.
- Address the consequences of significant budget and time constraints up front by adjusting scope.
- If you don't, your successor will.
- Turn the project plan into a math problem. The math either works or it doesn't. Show people.
- This is especially important when a project starts to go sideways.
- If you are being completely ignored you are in a bad situation and need a Plan B.

Getting a second opinion never hurts (well it might hurt, but it is worth it)



"I already diagnosed myself on the Internet. I'm only here for a second opinion."

- The day-to-day project team will work endless hours to make the project successful. This can cause them to lose perspective.
- Every significant project should have a steering committee that contains members willing to productively question the status of a project and provide feedback to project leadership.
- Consider asking a 3rd party to evaluate big projects on a monthly basis. Make them accountable to the steering committee.

You have to free up enough time for the users to participate

- One of the biggest mistakes we see are organizations investing in big new systems and underestimating how much their current staff will have to be involved in the implementation.
- Put backfill costs in the project budget.
- Backfill employees with contractors instead of vice versa.
- Also, it is unrealistic to expect that “big new systems” can be operated by the same number of staff as “old systems nobody was using much”. Build that into your plan.

Poor technology choices end poorly

- Unless you are trying to accomplish something truly unique, **don't be the first organization to implement a specific set of technologies that have never been implemented together before**.
- Find someone who has successfully implemented those EXACT same technologies before and visit them.
- Don't listen to what their executives say. Talk to be people with titles that have "engineer", "specialist", "operations", and "support" in them.

Decision Making Factors

Training your staff saves money

- It is astounding that most companies feel that sending project team members to be trained on new technology or system can't be done because it is expensive.
- This type of training is free because staff will be able to solve problems instantly instead of spending their first three months figuring out the very basics.
- This training will also result in the team doing things the right way and not configuring/coding you into a corner.

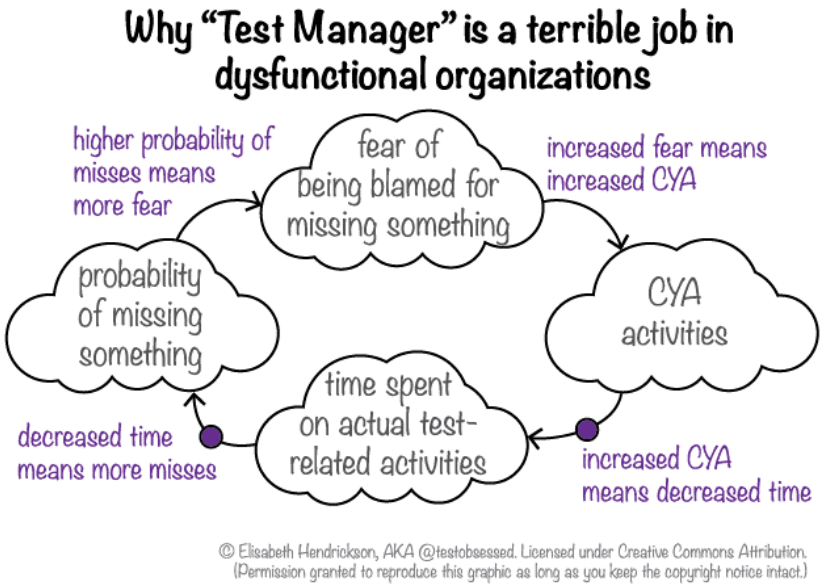
Your vendor is important, but make sure you are in control of the project

- Most vendors that serve nonprofit organizations do not have robust professional services groups.
- These vendors do tend to have specialists who are very good at performing certain tasks such as configuration, data conversion, etc.
- However, vendors are often not very good at project management, change management, testing, requirements definition, and process design.
- Make sure that the vendor is part of the project team and in a role they can be successful in.

Do not let senior management forget about your project

- An appropriately staffed steering committee should be resolve this issue.
- However, if you find that the senior executives are not participating or delegating their responsibilities, take immediate action.
- If the project starts to go sideways, you do not want to be in a position of having to educate key executives.
- If possible, for the largest projects, try to make sure the board is aware of the project, even if it is only a few sentences in the CEO's report.

Test everything, twice.



- Build your test cases based on your requirements not on your configuration documents.
- Our best practices show that testing data conversion should be done twice after all configuration changes are made.
- Do not ignore or let the vendor ignore performance testing.
- The users most impacted by the system should do the user acceptance testing.
- Test everything after material changes.

Questions and discussion