

# PLAN PROPERTY FOR THE CRITICAL UPGRADE

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## Part III

Last week (*Inside Business*, [Month-Day-Year](#)) we discussed Phase II - Identifying and Evaluating Vendor Software Solutions. If the rules outlined in Part I were executed well, Phase II was made easier and less prone to risk. If both Phases I and II were well executed, the risk associated with the Implementation Phase will be reduced. However, it will only make it less risky and less difficult - not easy.

### **Rule Number Eight – Select an Internal Project Manager with Experience in Projects of this Nature**

The software vendor will assign one, but the vendor's Project Manager will be guarding the vendor's interests first. Your organization needs a strong watchdog on the job. An outside source, independent of the software vendor, is usually best. They can bring the specific experience, skills, and level of dedication you need. They are free from office politics and can provide unbiased advice that serves the overall interests of the organization. When the internal Project Manager is an employee from a specific department, the new system can become forever known as "that" department's system. This perception reduces the odds of success.

### **Rule Number Nine – Develop a Thorough Project Plan and Manage to the Plan**

The Plan should include:

- Confirmation of the Project Scope and Budget
- Identity and time estimates of all tasks
- The definition of "Complete" for all defined tasks
- Testing Plan
- Training Plan
- Cutover Plan
- Personnel resources required –skill sets from all departments
- The definition of Roles and Responsibilities for Team members and stakeholders
- A Change Management process
- A Risk Management process
- An Issue Escalation process
- A Communication Management process

### **Rule Number Ten – Whenever a Risk Becomes a Real Issue, Resolve It as Soon as Possible**

Never delay. If tasks are taking longer than planned, find out why and determine if a solution exists. If The Plan needs to be adjusted, adjust it. If the solution is beyond the capabilities of the team, escalate the problem and get help. Never surprise the boss with old, bad news. Keep the executive sponsor informed and never give them reason to ask, "Why didn't you tell me earlier?"

### **Rule Number Eleven – Conduct Weekly Status Review Meetings with the Project Team and Monthly Reviews with the Executive Team**

Agenda Items for the Project Team would include:

- Discussion of Open Tasks and the Estimated Time to Complete each
- Needed changes to The Plan that can affect cost and schedule
- Any newly identified Risks
- Any issues that are affecting progress against The Plan and resolutions for each
- Specific To-Dos for the next meeting

Agenda Items for the Executive team would include:

- Discussion of actual status as compared to budget and schedule
- Any issues that are affecting progress against The Plan and resolutions for each
- Change Requests requiring executive approval
- Any newly identified Risks and remediation steps

### **Rule Number Twelve – Perform a Thorough “Implementation Readiness Review” and Execute the Cutover**

Many project teams have difficulty making that final decision to implement the new system. Sometimes these fears are unfounded, resulting from what we refer to as “the fear of flying”. The Project Plan is a good source of confidence. If all of the critical steps have been successfully completed, no outstanding significant issues or risks exist, and the system has been successfully tested, there is no reason for delay.

If significant risks do exist and system testing identified significant shortcomings in the system functionality or stability, do not proceed with the cutover. In most cases, there is no justification for putting the business at risk by implementing before the system is ready. If more time is needed, ensure that all shortcomings, issues, and risks are identified, corrective plans are developed, and then executed. It is then safe to proceed.

Once the cutover is underway, there will be surprises, both good and bad. If your organization has taken the time to prepare the way, none of the surprises will be insurmountable. One thought to keep in mind as you go forward: “If it was easy, *anybody* could do it!”

Following these twelve rules will help reduce the risk, disruption, and pain associated with these projects. However, no article or series of articles can guarantee success. Successful projects usually exhibit characteristics that never appear on any project plan: management commitment, teamwork, a willingness to change, and the ability to compromise are just a few. These characteristics, coupled with the approach outlined above, should give almost any organization the confidence to undertake what appears to be a very daunting project.