



FivePaths

Technology Project Implementation

A primer for Public agencies

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Technology Project Implementation

Successful technology system implementation is critical to ensuring the project receives the focus and resources required to succeed. Staying involved ensures the agency receives the product and services expected.

Without a careful focus on implementation, the resulting technology system can vary widely from the agency's expectations set during the initial selection of the tools involved. The result can be that your users will lack the features or training required to effectively use the system, as well as potential timeline and cost overruns. This can lead to a solution that feels more like an expensive mistake than a useful tool for the agency.

When implementing technology projects, consider the following steps:

Technology Contracting and Licensing

Many projects involve a paid outside contractor. It is important to first establish a strong relationship with them at the beginning of project implementation. There are several factors to consider when contracting and licensing software and services.

1. **Always Negotiate a Contract:** Never begin a technology implementation without an agreement on a contract. All contracts are negotiable, clearly articulate what you need and ask for changes required to the language to meet needs.
2. **Know All Costs:** Every contract should clearly specify the costs for the complete installation of the technology system and what licensing and support costs are required going forward.
3. **Determine a Timeline:** Ensure clarity on the length of the project and a delivery date.
4. **Clarify Communication:** Who is the point of contact with the vendor or consultant, and what updates will be provided ongoing? Ensure these updates will address cost, features, and timeline expectations changes.
5. **Identify a Process for Quality Control and Testing:** Most technology system implementations require some unexpected changes. Clarify the process for identifying these changes and how much of this cost must be borne by the customer.
6. **Establish a Data Migration Plan:** Moving constituent information into a new technology system can be a time-consuming and technically advanced task. Identify the vendor or consultant role in this process.
7. **Know Customer Responsibilities:** All customers must be involved in the technology

implementation process. Understand testing periods, data migration responsibilities, customer approval and sign-off milestones, and training opportunities.

Project Management and Communications

Implementing technology is a time-consuming and costly process, with many activities often happening at once. Ensuring strong project management and following a communications strategy helps to keep every participant well informed of their responsibilities and the next steps in the process.

Strong project management requires that the organization identify a staff person in charge of this task. Typical tools of a project manager to help keep the project on track include:

1. Identify a Project Manager: Someone you trust who is working in your best interest.
2. Calendar: Keep track of meeting dates for all participants and major project milestone dates, including the final launch of the technology.
3. Work Plan: Typically, the part of the contract that specifies what will be built/configured, what vendor support will be provided, what the overall timeline and cost should be, and the basic obligation of both the vendor/consultant and the organization.
4. Budget Spreadsheet: A list of vendor/consultant costs, software fees, and other costs per month during implementation
5. Task Lists: A list of tasks for individual staff to complete, such as reviewing technology functionality, making decisions on reports, testing, etc.
6. Change Management: Use tools to help people adapt to change, such as targeted communications to users, training manuals, one-page reference guides, and a process for identifying and approving/rejecting extra scope requests.

Technology Development

Some technology/software requires only basic setup and preparation before organizations can begin using it, while others require some or substantial customization before it can be used. In most cases, the development work substantially affects the final technology product and is the most significant cost component to implementation.

Technology developers require a clear understanding of an organization's business rules. The organization must work hard to clarify any informal or undocumented processes that affect the development of the technology and clearly explain these to the developer. The organization should review

the work of the developer at regular intervals to ensure the task has been completed to satisfaction.

Elements to consider during technology development include:

1. **Explain What and Why:** Conversations with developers require a focus on what feature should be built and why it is important from the organization's business perspective. Leaving out the why can lead developers to make wrong assumptions about how features should work, resulting in costly overruns.
2. **Get Involved:** Organizations should review features in development, even if other parts of the technology are not ready yet. This helps avoid mistakes from growing into costly budget items or missed timelines.
3. **Use Existing Tools:** Work with your development team on cost-effective ways to use existing tools to satisfy goals. Build as much as feasible on past investments.
4. **Track Accomplishments:** Track everything done, so the team can reflect on progress and celebrate successes. This is particularly important when working with external vendors to ensure you are getting what you expect.
5. **Clarify Change Requests and Bugs:** Be sure to identify issues that appear to be "bugs" (i.e., something broken the development team and/or vendor may need to fix within the scope and timeline) and "changes" (i.e., work that may cost the organization extra). Agree on this before proceeding to work on these.
6. **Track "Phase II":** Keep track of ideas and requests that are not required for launching this project but are important to consider for a later date.

Data Migration

Many organizations have information in older systems they wish to move into the new technology. This information is organized differently than the new technology system and requires some work to fit. Focus early on migration strategies to help ready your information for a smoother transition later.

Development teams and outside vendors require a close partnership with the organization to properly understand who has which responsibilities for migrating data. This results in tips and tools for how best to prepare for migration into the specific technology tool and how best both the development and other teams can support data cleanup and migration tasks.

Elements to consider during data migration include:

1. **Find the Data:** Organizations often have information scattered among staff inside different systems.

Find all the useful information required to populate the technology and identify who maintains it, what it contains, and how accurate it is.

2. **Improve the Data:** Moving inaccurate data into a new technology tool creates just another problem for users. Work to identify what is inaccurate about the data and repair what is possible before import to the new system.
3. **Identify Available Migration Tools:** Some technology systems and vendors/consultants have tools and services available to help transform data to fit the new technology and to move it into the system. Understand these tools and services early on and identify what work the organization must do to make use of these tools.
4. **Test the Migration:** Run a migration test and use the technology with this information. Check to ensure that the information arrives in the proper places in the technology and make corrections before the final import takes place.

Training and Support

Technology software offers a wide range of learning and mastery tools for users. Many users will require multiple exposures to documentation and training to gain the critical skills required to succeed with the new technology. Technology systems often provide written documentation, videos, and other self-paced training, while many provide group training or periodic in-person training opportunities.

Elements to consider during training include:

1. **Identify all Training Options Early:** Give future technology users a head start by introducing them to overview training for the new technology tool. Understand what is free and what is fee-based. Review training for quality and prepare users for future training.
2. **Plan for Gaps:** In many cases, the available training materials will not cover every feature the organization plans to use in the technology. Identify the written materials missing and any lack of availability of video, live webinars, and other forms of training required. Plan for how to learn these skills, either internally or through an external consultant.
3. **Learn in Context:** Practice technology skills using real data that the trainee recognizes and understands.
4. **Train the Trainers:** Internalize the knowledge gained from training so that organization staff can train other staff.

