

## Items to Identify (When, Where, How, and Who) in an Implementation Plan

### Network/IT Setup:

- Set up of new hardware and/or databases.
- Installation of software on server and clients on user terminals.
- Set up interfaces to Internet, E-mail, Fax, CAD, Report Tools, etc.

### Software Setup:

- Main system switch settings.
- Individual module settings.
- Administration set up (Passwords and Privileges).
- User set up (Preferences and Desktop view).

### Process Definition:

- Mapping out of all processes (Best practices) prior to software configuration.
- Write procedures based on new processes/software.
- Form building for website, intranet, or internal process.
- Report creation.

### Training:

- New hardware/database/other IT training.
- New software/report tool/3<sup>rd</sup> party product training.
- Training for new process procedures.
- Problem solving & change management

### Testing of system:

- Set up a Pilot system to test against.
- Test the ability to move data in from your legacy system.
- Write scripted tests to validate processes/software works as expected.
- Keep on-line after going live to use as a development/testing sand box.

### Data Mapping:

- Data that is moved from a legacy system to the new system should be cleaned prior to transfer. (i.e. Delete obsolete part numbers, remove duplicate customers, etc)
- Reduce open P.O.'s, work orders, sales orders, etc. prior to data mapping to reduce the amount of data that needs to be transferred.
- Based on the amount of data, it may be less costly to data enter some items from scratch vs. setting up, testing, and then performing a live automated mapping transfer.

### Go Live:

- It is best to cutover from an old system cleanly and completely on one day.
- The older legacy system has any necessary transactions completed, prior to final data mapping transfers.
- Push the button, keeping a close eye on all system activities to ensure they are performing as expected.

**To be Successful:**

- Schedule should be realistic and agreed upon by all parties.
- Each module or major functional process is assigned an owner who is “hands-on” during software configuration and testing.
- Team should learn needed skill sets prior to implementation.
- Include all heavy users in the process mapping, creation, and testing phases.
- Set measurable goals at the start that will be reviewed in a post-mortem for the project.