April 27, 2018 – Professional Development Training (PDT)
Session Topic: New System Implementation – Lessons Learned

Session Purpose and Objectives:

Your organization has decided to implement a new accounting or ERP system. Your current system is aged, costly to maintain and/or at risk of failure. However, budget resources are limited and this project needs to be a success and come in under budget and on time. What advice can be gained from other organizations that have gone through the same experience?

Objectives:

- In the spirit of intergovernmental cooperation, candidly share details of your financial system implementation
    - Allow others to learn from your mistakes, as well as,
    - Allow others to benefit from your lessons learned

Question and Answer

Facilitator will ask questions and each entity to be given an opportunity to respond to each question, or comment on what other speakers had said. Cards provided to the audience to submit their questions.

Overview Question

1. Please give us an overview of the project at your entity: what did the system cover, when did you go live, or will you go live, and how would you rate the success of the project (i.e. was the project on time and on budget?)

RFP Questions

1. What steps did you take as part of preplanning for a new system implementation, even before the RFP (e.g., operational review, budget planning or survey of user expectations)?
2. How did you ensure that software and service requirements were clearly defined and incorporated into contracts as appropriate? Are more requirements better, or worse?
3. How important were key implementation deliverables and milestones as part of your RFP? Please share some examples of milestones on your project.
4. How successful were you at ensuring that your RFP was reflective of the total solution to be built, including: interfaces, conversion and reports?
5. What was your approach to including post go-live activities as part of your RFP (e.g. maintenance, managed services, and/or upgrades)? If included in the RFP, did this help with ensuring stable and predictable future costs?

Project Questions

1. Were you able to leverage resources early for the project, especially resources that had gone through the process before, and did this increase success on the project? If not, how did this lack of early momentum impact the project?
2. How did you ensure the right mix in sharing the workload, between government and contract resources?
3. How important is it that you have the current process documented and how familiar was your project team with the current environment, on both the functional and technical teams?
4. Did you adopt the system process, or did you attempt to mimic your current processes as much as possible in the new system? How do you feel about that decision in retrospect?
5. Were you able to standardize chart of accounts, budget controls and business processes as much as possible? If not, what do you feel the impact of not doing so, has been, good or bad?
6. Did your project include system integrations? If so, what would you say to others about how to approach such system integrations?
7. Did you feel that your approach to testing was robust enough? What would you do differently, if you could?
8. What was your approach to designing reports? Did you adopt what you feel to be an appropriate report governance strategy?
9. What was your approach to training, to use internal staff for training, or contract with a vendor for training services? What would you suggest to others?

Change Management & Communications Questions

1. What was your organizations approach to change management? How did this help stakeholder engagement and acceptance?
2. Did you include stakeholders from other departments during the implementation? If so, what part(s) of the implementation were they involved in, and how did you incorporate any feedback you received?
3. How did you ensure you had all relevant parties included in key decisions?
4. What stakeholder communication tools did you use as part of your project (e.g., website, FAQs newsletter, e-mails, etc.)?

Final Analysis Questions

1. What were the most significant factors for getting your project to the Go Live date, as close to on budget and on time as possible?
2. How did you limit scope creep and shifting requirements, during your project?
3. How successful were you at eliminating redundant systems as part of your project?
4. What are some other lessons learned that you would like to share?
5. Other questions, as time permits?