A Suggested Approach to Conducting a Project Implementation Review

A Rich Consulting Point of View

January, 2006

Presented by:

RICH consulting

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Introduction

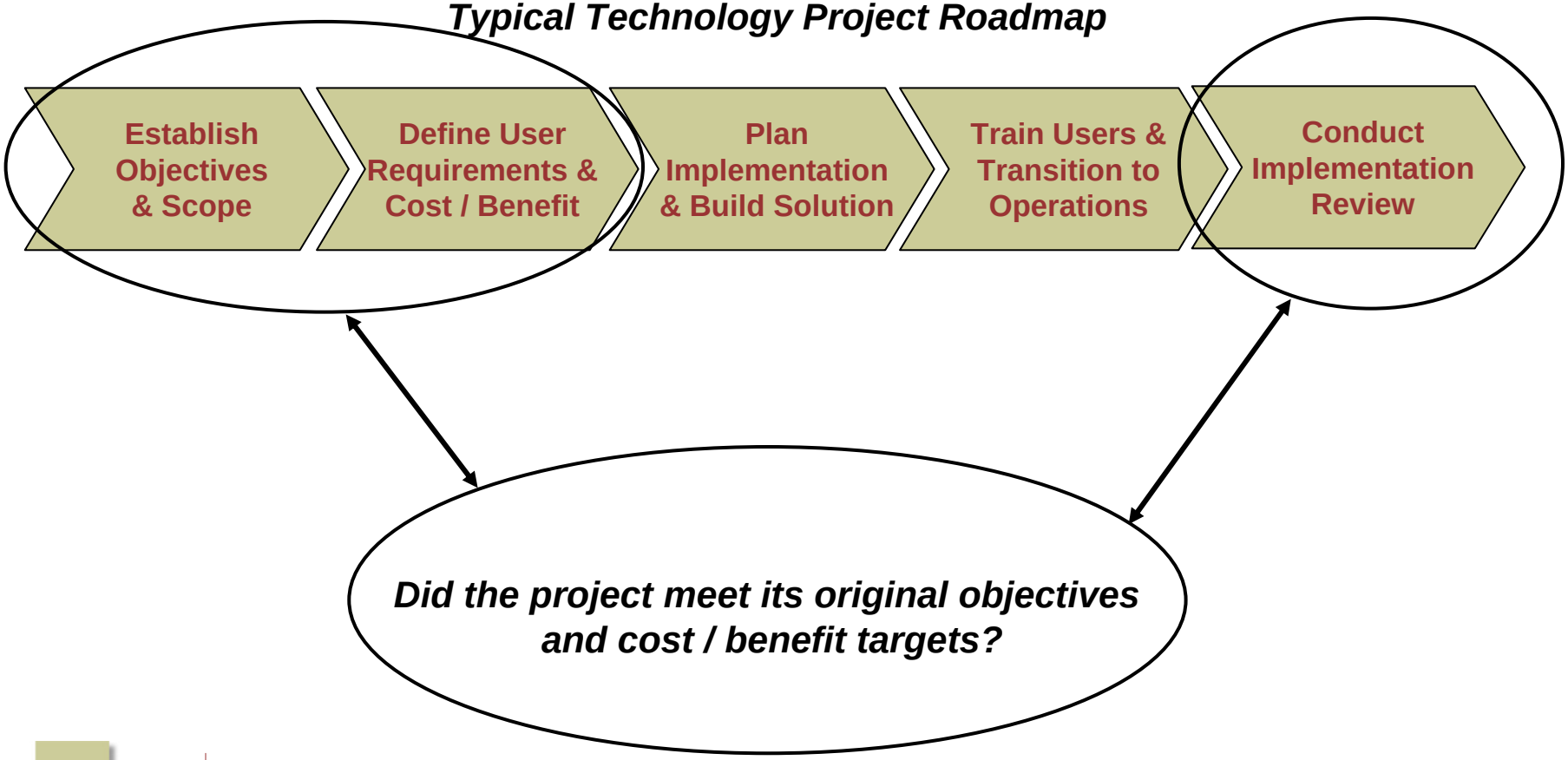
Capturing the Value of Technology Investments

- As we have written previously, the challenge in selecting and managing technology projects has always been in delivering the targeted results. Shortfalls generally occur due to a variety of reasons:
  - In the early phases of a project, problems can begin with poor definition of business requirements, inadequate business case models, lack of rigor in evaluating and selecting solutions, insufficient implementation planning, etc.
  - In the later phases, failures are generally associated with poor execution of the implementation plan, or inadequate coordination with the user community.
- In a previous article we addressed the *early phase* issues of properly defining requirements, building risk-adjusted business case models, achieving alignment, and developing an effective implementation plan. This article addresses the *later phase* issues and provides a suggested approach to conducting a *Project Implementation Review*. This review process can be useful in evaluating progress toward original project objectives and developing appropriate corrective actions.

Introduction (cont.)

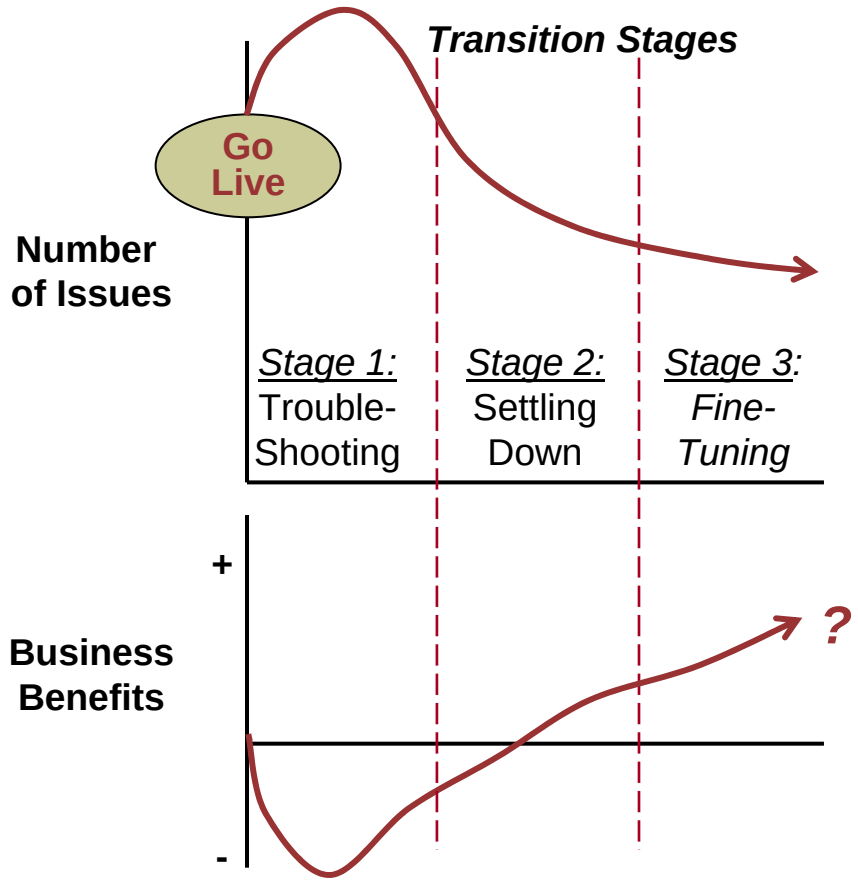
There are many phases to a successful technology implementation project … and the last one is often overlooked!

Typical Technology Project Roadmap



Transitioning to Operations

After the initial Trouble-Shooting Stage, business benefits should begin to accrue. But do they???



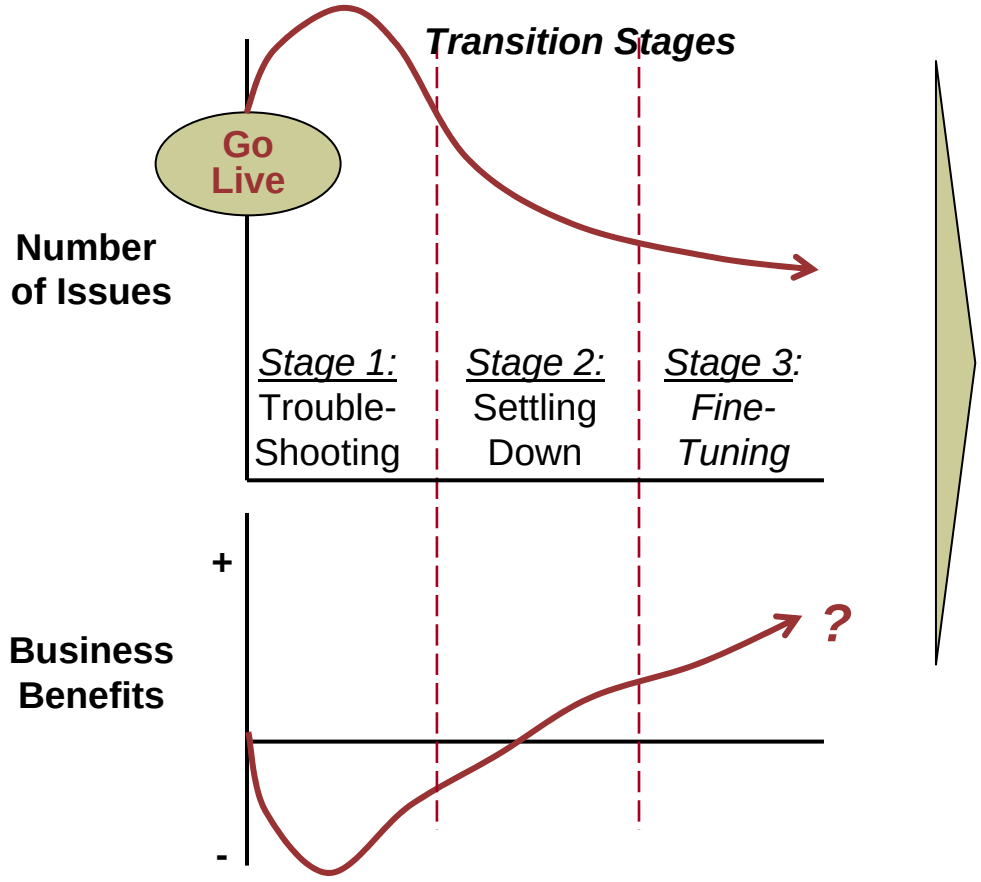
- After the *Go Live* event, there is typically a prolonged period of *"Trouble-Shooting"* to resolve implementation and performance problems

- As problems are resolved, operations begin to normalize and benefits begin to accrue… *Or do they???*

Source: Adapted from Simon Wallace, ePMbook, 2002

Conducting the Project Implementation Review

An Implementation Review should be initiated as the project moves through the Fine-Tuning Stage, to fully evaluate the results being achieved.



Key Questions

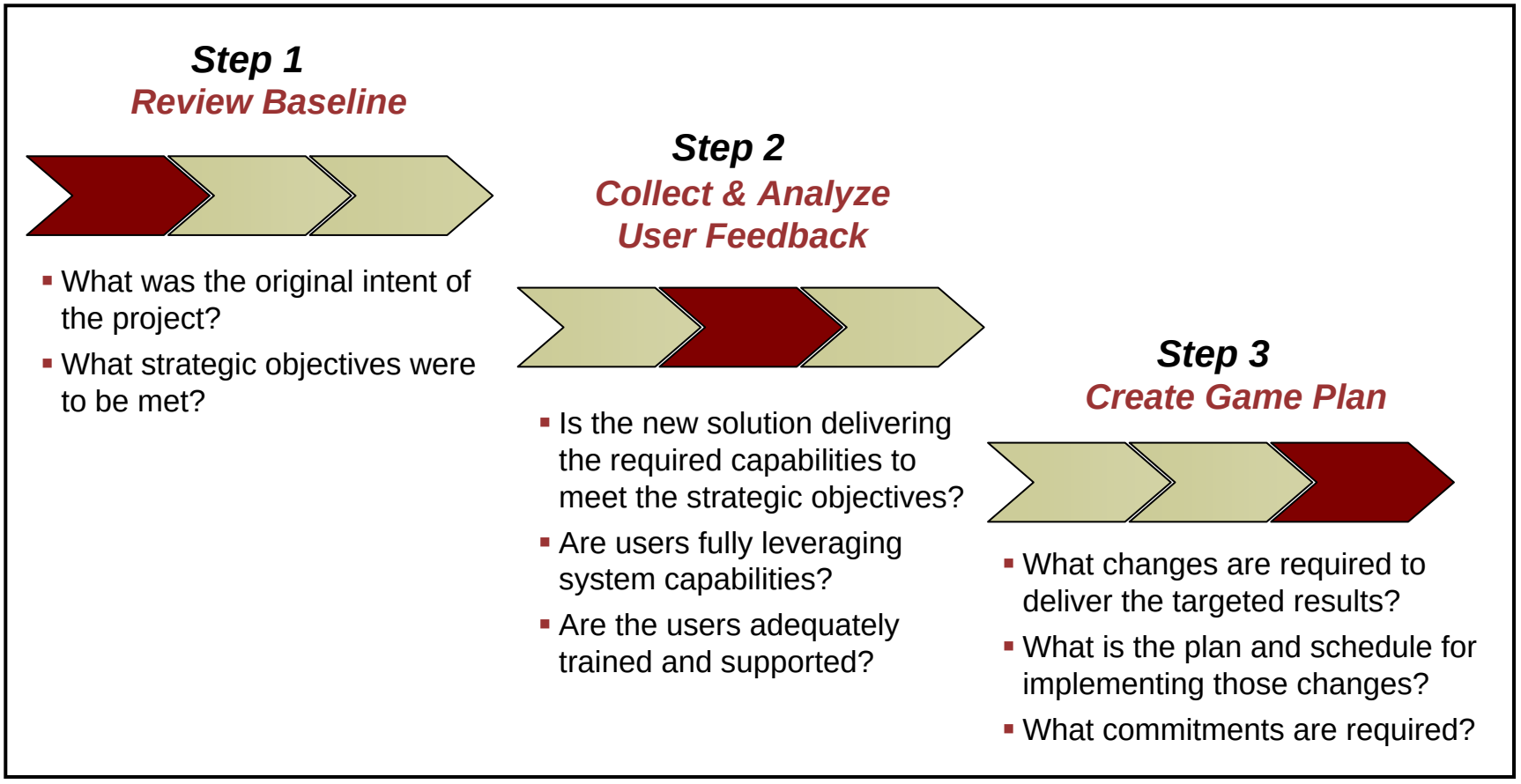
- Were the business objectives met?
- Is the new functionality working and are the users using it?
- Are project costs on-budget?
- Are the targeted benefits being delivered?
- What are the lessons learned for future implementations?
- Can the new solution be improved?

Required Actions

- What is the plan to optimize project value?
- What are the key steps and commitments?

Conducting the Project Implementation Review (cont.)

We suggest a three-step approach to answering the key questions...



Step 1: Review Baseline

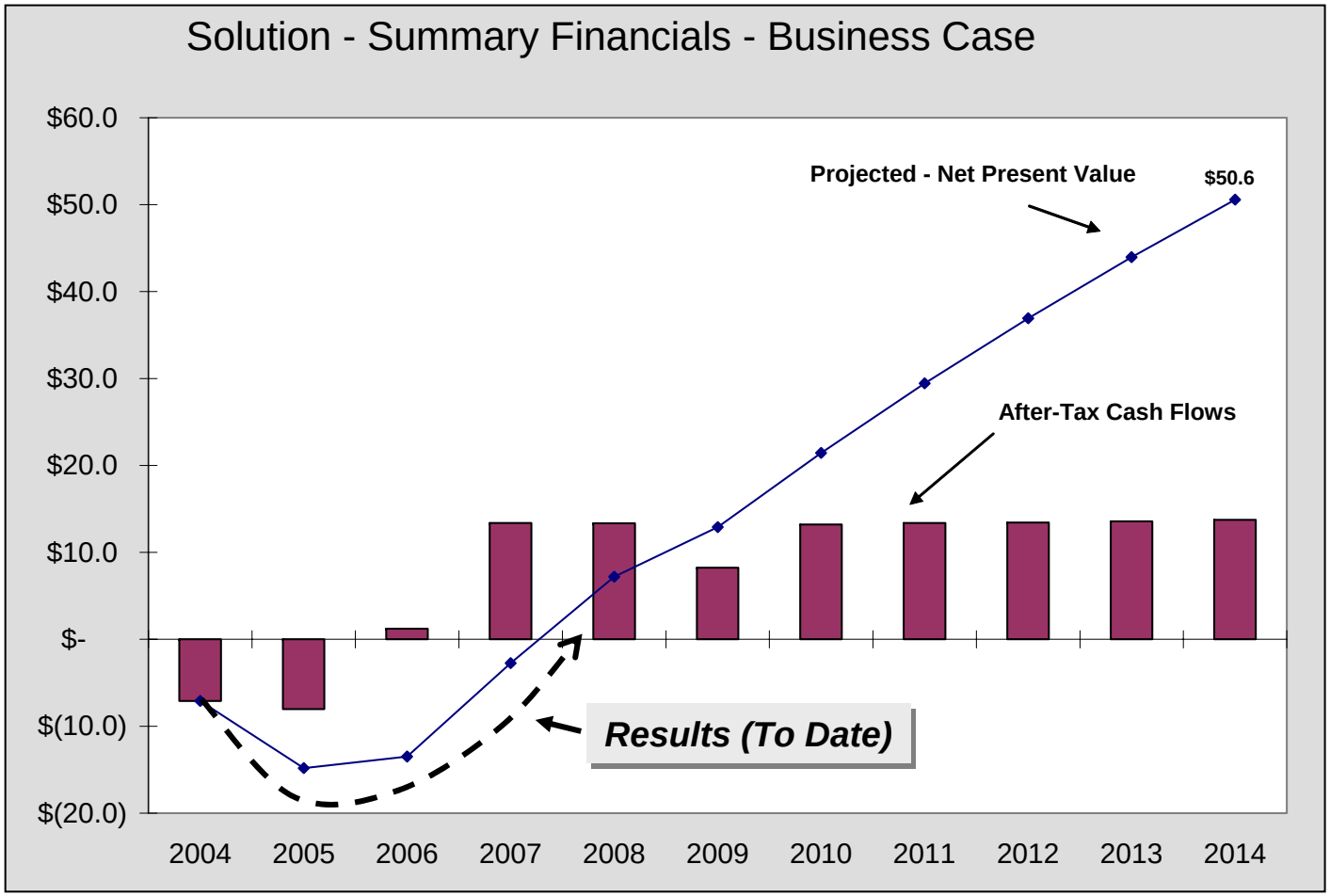
A good place to start is to map solution functionality to project objectives …

Sample Matrix for Work Management System

Solution Functionality	Project Objectives			
	Increase Field–Force Productivity	Reduce Administrative Costs	Reduce Errors and Re-work	Reduce Hand-offs & Cycle-Time
Auto-Generation of Work Orders	X	X		X
Standardized Processes / Procedures	X			X
Auto-Assignment / Auto-Routing	X	X		
Efficient User Interface	X		X	
Field Information Access / Data Entry	X	X	X	
Automated Workflow		X		X
Sample Metric	***Ave. No. of Work-Orders / Day***	***Total Monthly Admin Exp***	***First-Call Resolution %***	***Ave. Work-Order Cycle Time***

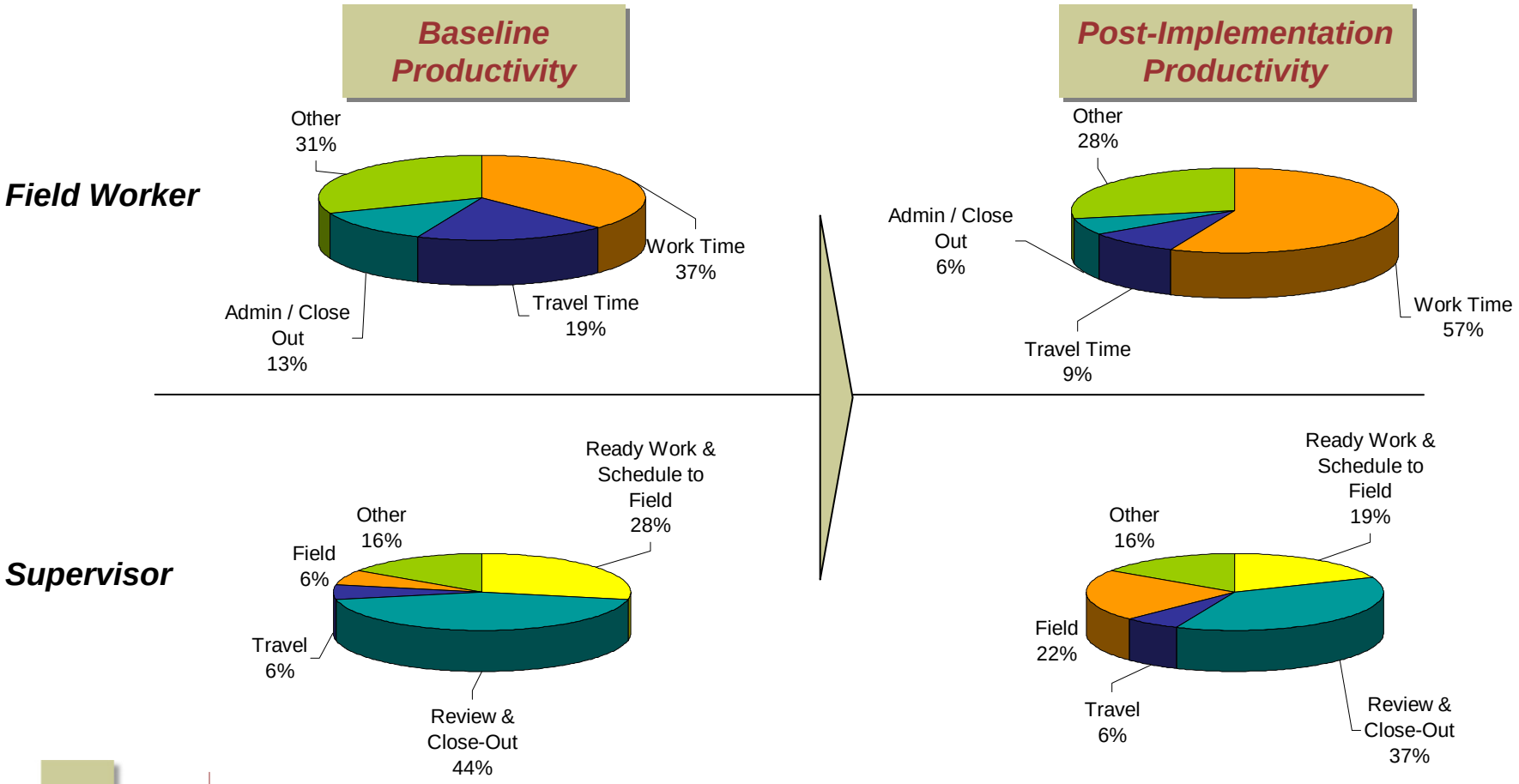
Step 1: Review Baseline (cont.)

Next, compare results to date with the original business case …



Step 1: Review Baseline (cont.)

The Business Case results reflect changes in operational metrics. Where are the variances from targeted improvements?



Step 2: Collect and Analyze User Feedback

Sample framework for collecting feedback from end-users.

Sample Workflow for Capital Construction Work

	Initiate Work	Plan Work	Schedule Work	Perform Work	Close-Out Work
New Solution Functionality	▪ Automate receipt of work order information ▪ Open project / assign number ▪ Route to Design or Construction	▪ Estimate costs through design module ▪ Automate development of materials list ▪ Route job to secure approvals and sign-off	▪ Schedule internal and contractor work and resources ▪ Track project status ▪ Requisition / Issue material	▪ Automate steps and procedures ▪ Manage contractor and crew work ▪ Capture time entry and “as-built” costs	▪ Close project (automatically or manually) ▪ Conduct closing audits ▪ Update Financial records
End-Users Issues and Challenges	▪ Missing data for initiation (Training) ▪ Inability to route/assign to appropriate resource (configuration) ▪ …	▪ Lack ability to evaluate cost of multiple designs (Configuration) ▪ Point of no Return – restrict ability to revise (System) ▪ …	▪ Some jobs dropped by system (training) ▪ Difficult to prioritize work (Training, Upgrade) ▪ …	▪ Lack of critical data on field device (Configuration, Upgrade) ▪ No ability to change/cancel work in field (Training) ▪ …	▪ Close-out is a time-drain (Process) ▪ Field coming to office to close-out work (Confg., Process) ▪ …

Similar tools should be used to review all affected work processes, identify where users are having problems, and determine root-causes.

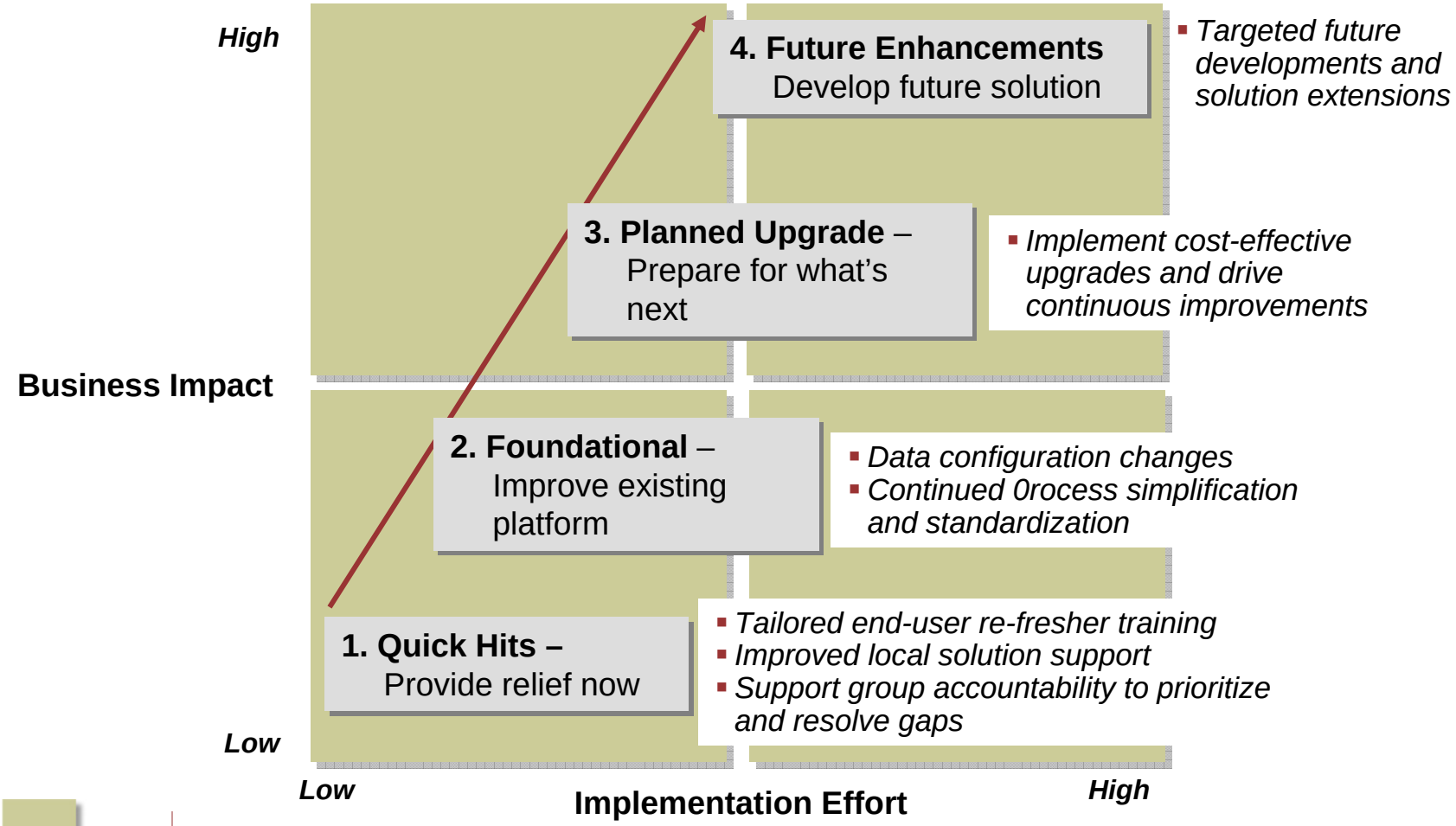
Step 2: Collect and Analyze Feedback (cont.)

The diagnosis should fully explore findings, so that appropriate corrective actions can be developed …

Findings	Gaps & Implications
Operational Issues	
▪ Field workers unable to access and modify data in the field	▪ *End-User Productivity*: Creates need for field stop work and coordination with back-office
▪ Initial Training and Roll-out was strong; however, frequent changes and lack of tailored guides presents barriers for end-users	▪ *Training and Support*: End-users confused and frustrated. Highlights need for support, training, and communication of best-practices
▪ Supervisors tied to system -- struggling to get work to field, schedule it, and sign-off on completed work.	▪ *End-User Productivity / Standardization*: Process is broken. Supervisors focused on administrative tasks and facilitating workflow
Technical Issues	
▪ Early data configuration decisions created complexity and is leading to errors, re-work and excessive administrative requirements	▪ *End-User Productivity*: Data complexity causing problems…
▪ …	▪ …

Step 3: Create Game Plan

Lay-out the overall game plan and sequence of activities



Step 3: Create Game Plan (cont.)

Schedule and execute the plan

Near-Term Actions

- Clarify Roles and Accountabilities
- Strengthen Vendor Collaboration
- Prioritize, and Schedule Initiatives
- Revamp Change Request Process
- Conduct Refresher Training

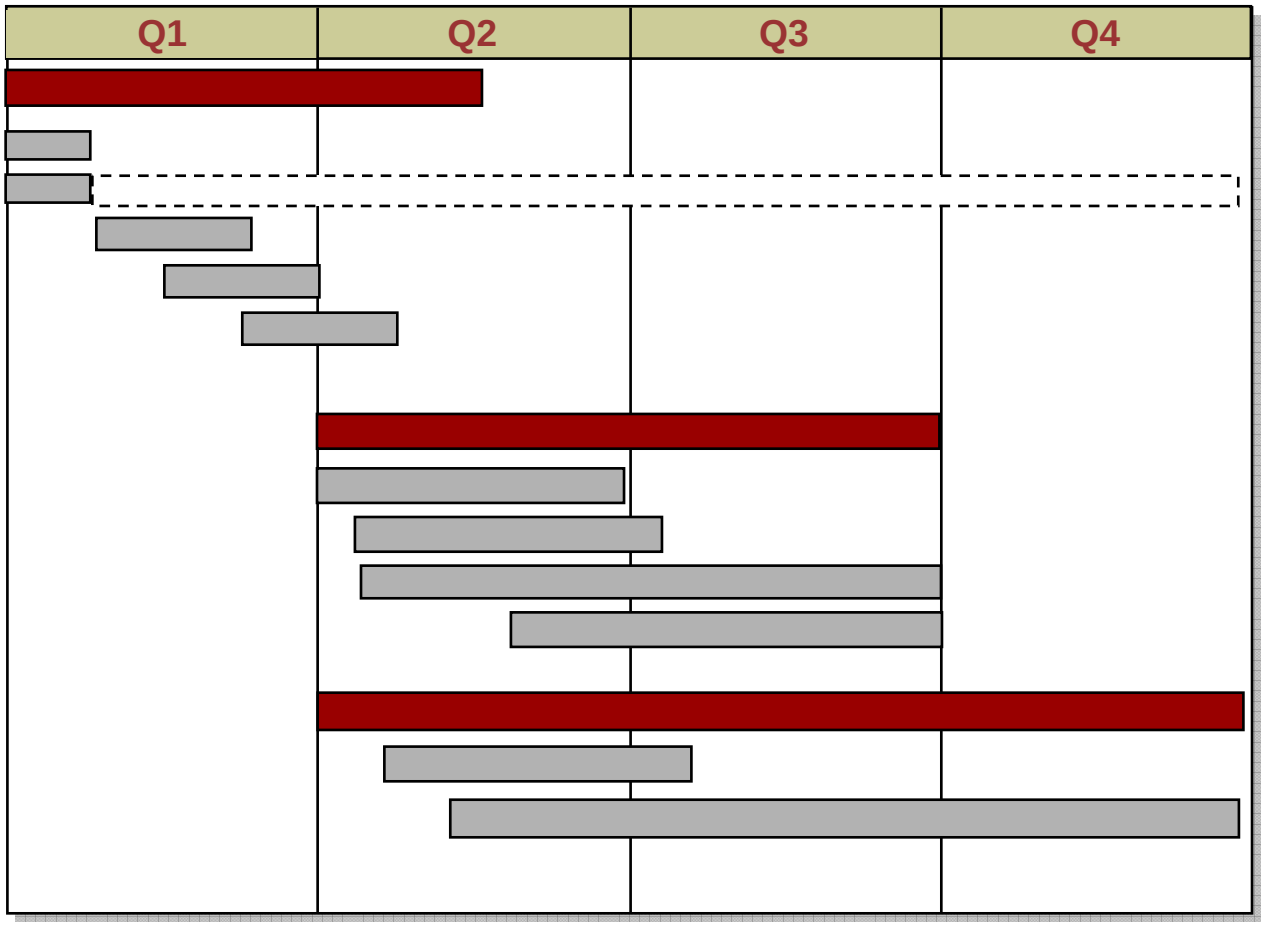
Medium-Term Actions

- Simplify Data Configuration
- Streamline Procedures
- Standardize 'Top 10' Processes
- Automate Scheduling Process

Preparation for Upgrade

- Identify and Quantify Benefit
- Plan and Implement Upgrade

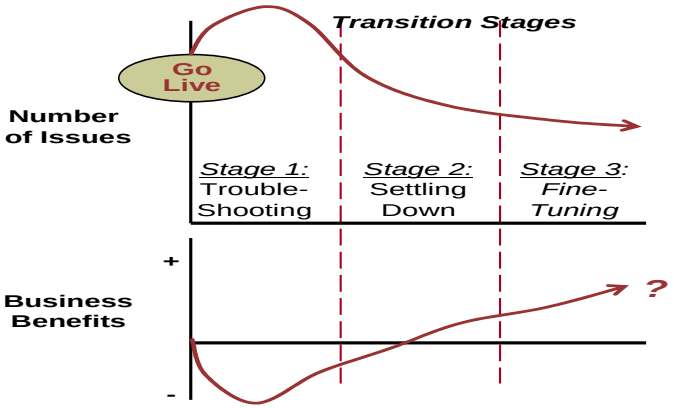
Sample Summary Plan

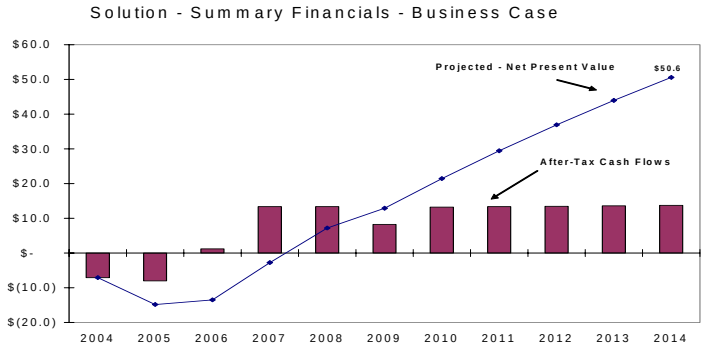


Summary: Apply the Discipline of Execution

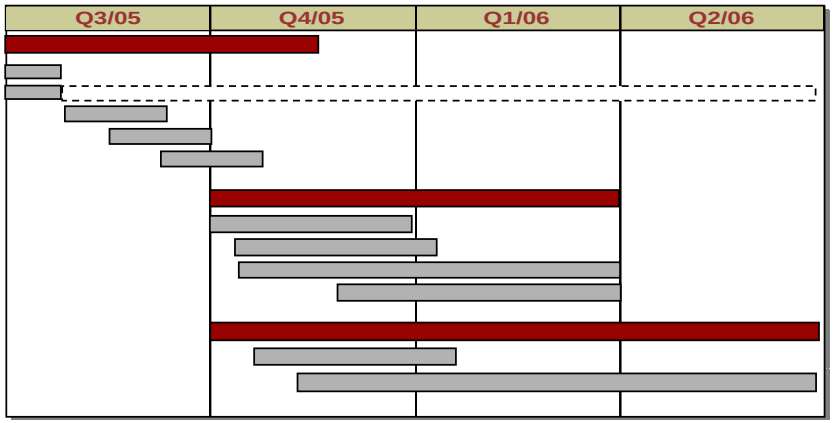
Apply a disciplined approach, analyze results to date…

Analysis





Action Plan



…and develop an appropriate corrective action plan with key milestones and accountabilities!

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