

# IMPLEMENTATION SURVIVAL KIT



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# Agenda



- Planning
- Expectations
- Training/Education
- Collaboration/Advocacy
- Shiny New Objects
- Work
- Everything Else

# Planning



“ By failing to prepare  
you are preparing to fail. ”

© *Benjamin Franklin*

# Planning



- Define Products and Services Purchased
  - ✓ What's in the Contract
  - ✓ Demo Overload
  - ✓ Statement of Work (SOW)
  - ✓ Scope Creep

# Planning



- Your Definition of Success
  - ✓ Picture the Finish Line
  - ✓ Revisit Your Pain Points
  - ✓ Whole Team's Perspective
  - ✓ Hold Pre Kick-Off Kick-Off

# Planning

- Strategize to Succeed Despite Expectations
  - ✓ Contingency Plans



# Planning



- Identify Stakeholders & Key Roles
  - ✓ Executive Sponsor
  - ✓ Project Manager
  - ✓ Team Lead
  - ✓ SME

# Expectations

Be realistic about expectations.  
I'd really like to cuddle a unicorn  
but it ain't going to happen



-India Knight



# Expectations



- Fear of Change
  - ✓ Everyone Has It
  - ✓ Recognize, Address, Move Forward

# Expectations



- Requirements
  - ✓ History
  - ✓ Integration & Automation

# Expectations

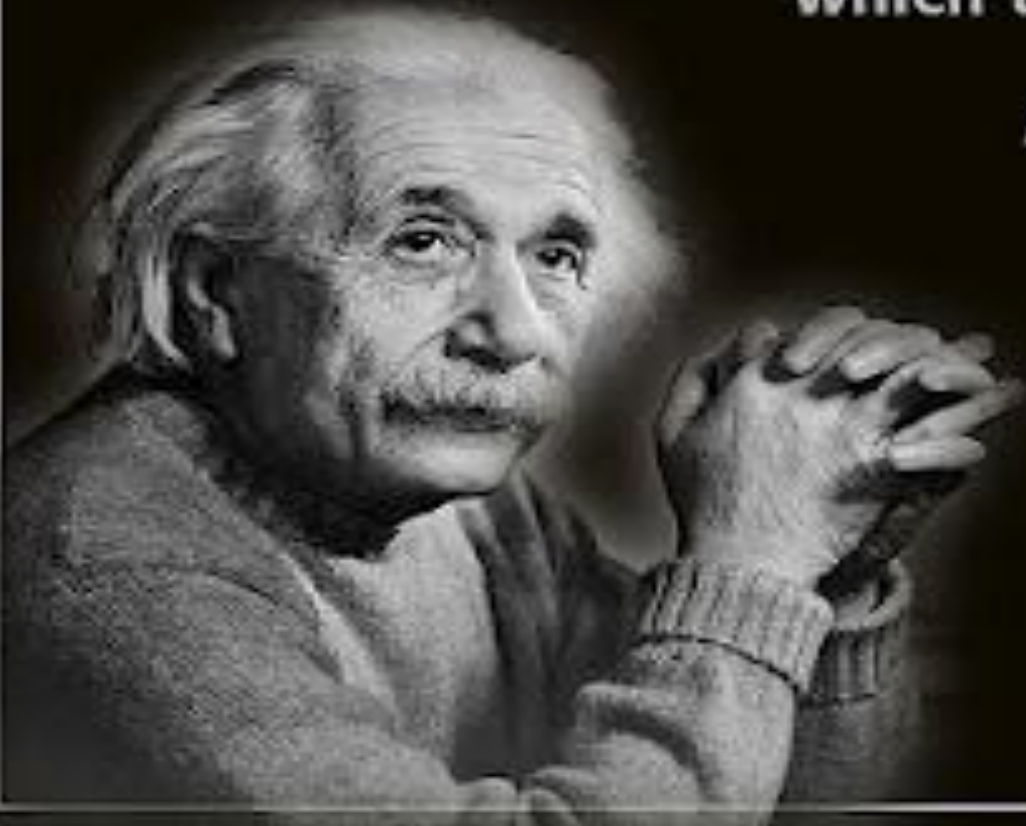
- Timeframes, Go-lives and Your Day Job
  - ✓ Be Realistic
  - ✓ Challenging And Attainable
  - ✓ Planning is Key



# Training & Education

**"I never teach my pupils, I only  
provide the conditions in  
which they can learn"**

**Albert Einstein  
1879-1955**



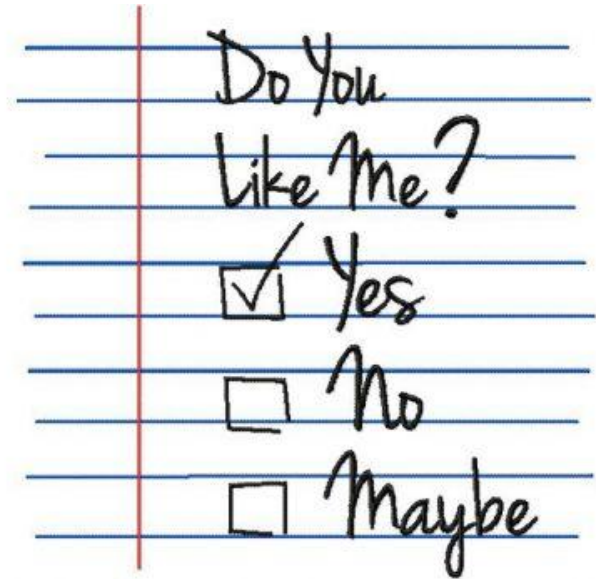
# Training & Education



- Effective Training
  - ✓ Don't Discount, Budget Accordingly
  - ✓ Utilize Your Vendor
  - ✓ Review Your Contract

# Training & Education

- User Adoption, Project Success
  - ✓ If People Don't Like It, The Project Will Fail
  - ✓ Effective Education Enhances Success



Do You  
Like Me?

Yes

No

Maybe

# Training & Education



- Proper Training For Me, For Us and For Them
  - ✓ Training Begins At Kick-Off
  - ✓ Don't Be A Silo
  - ✓ Have A Training Roadmap
  - ✓ Select Appropriate Training Method

# Collaboration & Advocacy



*"Alone we can do  
so little;  
together we can do  
so much."  
~Helen Keller*



# Collaboration & Advocacy

- Project Management
  - ✓ Traffic Cop
  - ✓ Keeping Folks On Task
  - ✓ Executive Communication



# Collaboration & Advocacy



- The Implementation Team
  - ✓ Your New Best Friend
  - ✓ Knowledge Of Their System & Company

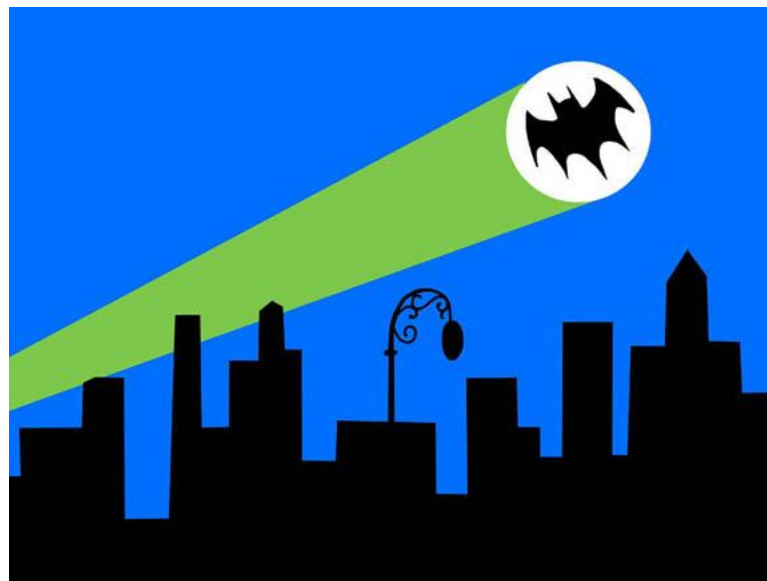
# Collaboration & Advocacy

- Your Own Team
  - ✓ Daily Routines
  - ✓ Keepin' 'Em Happy



# Collaboration & Advocacy

- When To Ask For Help & What To Ask For
  - ✓ Implementation v. Day to Day
  - ✓ Swim or Tread Water?



# Collaboration & Advocacy

- Holding Accountability
  - ✓ Everybody Is Accountable
  - ✓ Us v. Them



# Shiny New Objects



Fawkes is a phoenix, Harry.  
Phoenixes burst into flames when  
it is time for them to die and are  
reborn from the ashes.

-J.K. Rowling

# Shiny New Objects



- Leveraging New Technology
  - ✓ Legitimate Business Process or Work-Around?

# Shiny New Objects

- Rebooting Business Practices
  - ✓ Tear It Down & Rebuild





# Shiny New Objects

- Creative Solutioning
  - ✓ Focus On The End Goal
  - ✓ The Big Picture



PERSEVERANCE IS FAILING 19 TIMES  
AND SUCCEEDING THE 20TH.

-JULIE ANDREWS



# Work



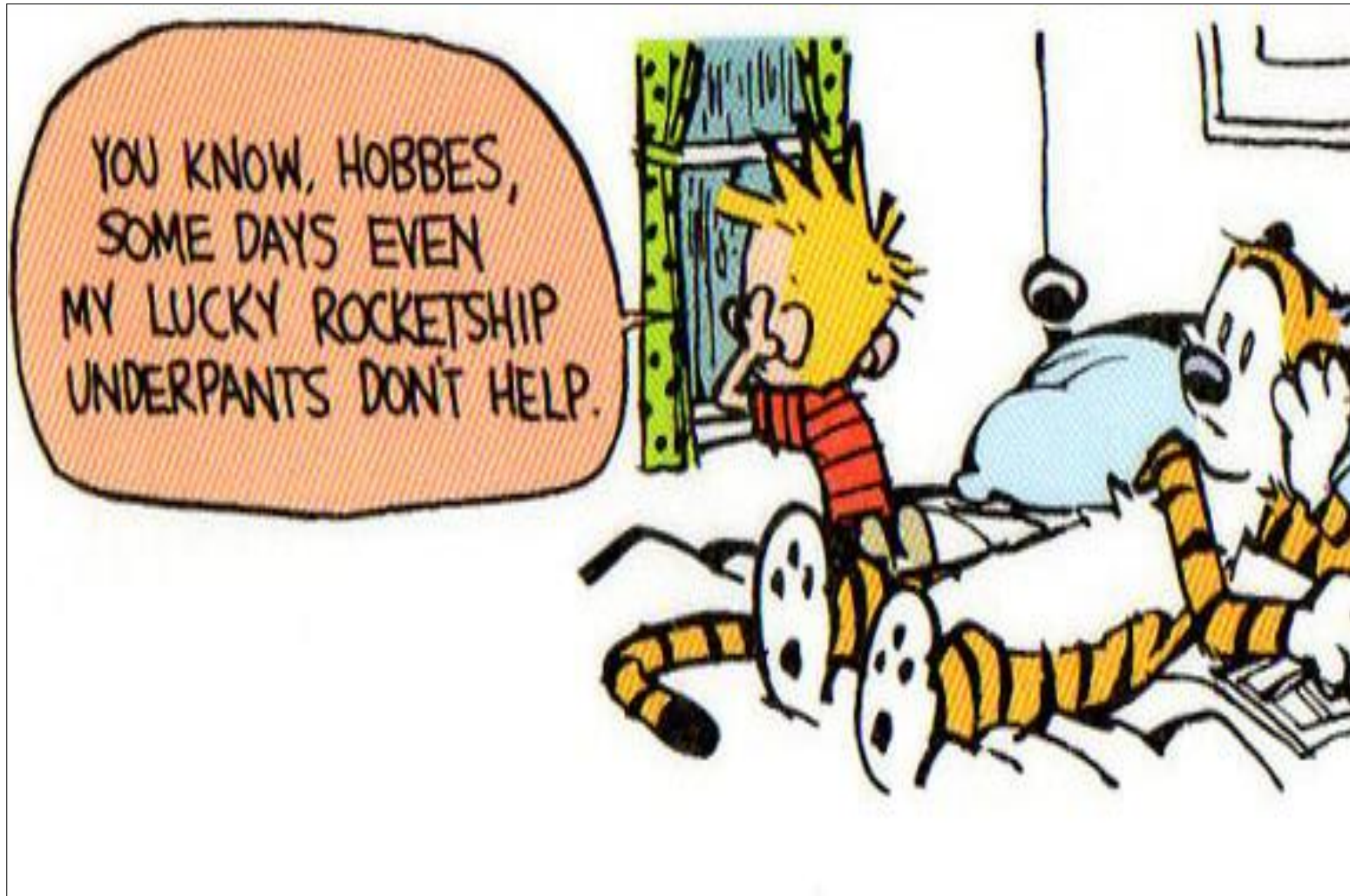
- Audit, Audit, Audit
  - ✓ Where To Begin
  - ✓ Be Smart
  - ✓ Downstream Consequences

- Data Scrub
  - ✓ Garbage In, Garbage Out
  - ✓ Don't Dirty Up Your Clean Slate
  - ✓ Utilize Your Tools (Old & New)

- Validating Statutory Compliance
  - ✓ Now's Your Chance!
  - ✓ When Opinions Differ
  - ✓ Pick Your Battles

- Test Scenarios – Define & Execute
  - ✓ Control Groups
  - ✓ Remember One-Time Occurrences
  - ✓ Best Practices from Vendor
  - ✓ Use What's Already There
  - ✓ Don't JUMP!

# Everything Else



# Everything Else

- Coping & Perspective
- Mistakes & Errors
- Maintaining a (healthy) Lifestyle
- Late Nights & Travel



**KEEP  
CALM  
AND  
IMPLEMENT  
ON**