Best Practice Series
Software Implementation Projects
Conference Room Pilot Preparation
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Summary:

In previous articles, we focused on the "front-end" of an implementation project, including setting up clear top management support, involvement and communication, and selecting a Best Practice implementation project team. When these are accomplished with Best Practice methods and principles, the team is, at this point, operating in a low-risk field – so far, so good.

In this article, we discuss preparation for a Best Practice Conference Room Pilot. This includes making sure the team itself is sufficiently educated and trained, and that the CRP itself is sufficiently organized. In our next issue, we will discuss the detailed implementation preparation activities, the "dress rehearsal" aspect of the CRP – where the rubber hits the road before the rubber *really* hits the road – and the Go-Live preparations critical to success.

Topics include:

- Education and Training for a CRP
- CRP – the Dress Rehearsal
- CRP facility – organizing for success

Education and Training for a CRP

The first step in this area is to clearly separate education from training, as we do in other chapters in this book. Briefly, in the context of implementation, the purpose of education includes:

- **New concepts** – these are underlying thought processes, and assumed understanding that is embedded in the Best Practices integral to the new software. The implementation team *must* clearly understand these if it is to be effective in the CRP process and implementation preparation that is at the core of the CRP. Often these are different ways of looking at things, different perceptions. If one doesn't understand these, there can be a real crippling effect, as people (unintentionally) try and force-fit the new software to work the "old" way.

  Example – many problems associated with implementations of material planning (MRP) functions stem from the fact that those using it have not been adequately educated in MRP concepts. Effectively using software delivering MRP capabilities has a poor chance of succeeding if the users are blindly clicking on buttons and following rote procedures. A person who truly understands the concepts involved with a particular software function can almost figure out how the software does it for one's self.

- **Precedes and informs detailed planning** – when project planning is done by people who truly understand the concepts behind the business processes and more effective work flows the new software can bring plan the steps from "here" to "there" there is always a shorter, direct path to the objective than will otherwise occur.
- **Speeds up detailed, hands-on training** – As was just mentioned, the actual amount of detailed, hands-on training needed to become proficient with the software is a small fraction of that required to "teach" rote-style, how a person is to do their job with the new system. We have observed people like this taking notes that say "hit the down arrow 3 times, then press Enter…" and the like. Frightening, from a management point of view! As MRP legend, George Plossl said many years ago "If you think education is expensive, try ignorance!"

Ideally, education of the core project team precedes the business process analysis and software selection process discussed in the preceding chapters. If it has, so much the better. If not, start now. In any case, though, the education process should be expanded to include others in the company who will be using or otherwise involved in the system. The implementation planning process that is the core of the CRP includes a detailed education and training plan for all who will be using the new system's functions.

CRP – the Dress Rehearsal

In any event or occasion where things have to "go right" on the first day, not only planning, but repeated rehearsals, practice and training are absolute requirements. Smart theater producers know this and make *sure* that, after the cast has been selected, and the production planned in detail, that there is enough time to practice, to rehearse the play, so that on opening night, when *everyone* is watching, things go smoothly. In similar fashion, the wise sky-diver will train, prepare, and practice thoroughly before stepping out of that door in the perfectly good airplane at 12,000 feet.

Two major points bear reiterating here.

1. **Requirement**s **-** make sure everyone fully understands the To-Be business functional requirements, which all too often have been poorly documented during the initial stages of work. These may need to be revisited, revised, clarified, re-thought, and otherwise solidified.
2. **Objectives** – it is easy to get lost in the details of a new software system, changes, issues, and the like. There should be, ideally as part of the requirements, specific, measurable objectives that the new system is intended to help bring into operation. Examples might be "reduce order cycle times by 50%" or "improve service levels to 98%."

We have wondered for years why this kind of analogy seems often lost on software implementation planners, who sometimes treat preparations with low-level contempt – as though everyone should just "know how to do their jobs" with the new tools "auto-magically."

The Conference Room Pilot (CRP) has been used for many years by wise implementation leaders to educate, train, plan, rehearse and otherwise make *sure* that the Go-Live event and transition is smooth. To clarify, other discussions of the CRP often include the business process analysis and the as-is and to-be work described in the preceding articles. Here, we assume these tasks have been properly completed and focus on the rehearsal aspects. We also suggest downloading and reading our free White Paper "The New Conference Room Pilot."

CRP Facility Setup – Organizing for Success

A Best Practice implementation project has, at its core, a rigorously done CRP. For the team to have the ability to complete a Best Practice CRP, it absolutely MUST have an appropriate, dedicated work place and facility where the work can be effectively and efficiently completed. There, the team can meet, work, resolve issues, and repeatedly operate a test version of the system being implemented. Short-changing any of these seriously degrades the effort.

We realize that much of this discussion may seem mundane, even tedious ("can't we discuss something *important?")* However, you might be amazed at how often implementation teams seriously short-cut these guidelines, only to have serious problems later. Here, "adequate" means:

- **Assigned Administrator** – the CRP facility should be the assigned responsibility of an appropriately qualified person with the available time to do the work. This may be the project administrator, or if the project is large enough, a separate person.
- **Computer resources** – either dedicated workstations, or where people can connect their personal laptops to the appropriate network, data base, etc. so that the system can be tested and exercised.
- **White-board space** – preferably, the walls of the room are covered with write-on-able surfaces, e.g., white boards. These are essential communication and collaboration tools.
- **Business Process Maps/Documents** – readily available and visible in the CRP work room should be at least high-level charts of the business process mapping and documentation process completed earlier, with emphasis on the "to-be" information, as this will be repeatedly used through the entire CRP process to guide decisions, serve as references and to keep the team on track. Ideally, these are literally up on the wall of the CRP work room. In one case these charts consumed 11 large walls.
- **Food, drink** – it is helpful if the team can keep working in the room, to make the most of the too-short (it always seems) time available, something enabled by water, coffee ("business rocket fuel"), and healthful snacks, so people can keep focused. We also recommend bringing in meals for the same reason. Restrooms should be nearby also. Help everyone make the most of the work sessions.
- **Chairs** – this is not the room for the 30-minute meeting folding chairs. Keep the seating from becoming a distraction or a business source for the local chiropractor.
- **Room for everyone** – the entire team should be able to sit down and work effectively at the same time, not sharing a workstation.
- **Scheduled times** – the work sessions for the CRP should be regularly scheduled, ideally during times of the day when the participants are not regularly interrupted for operational decisions and actions, other meetings, etc.
- **Dedicated system and data base** – the team will practice, test, alter the configuration, enter data, and other activities during the CRP. The system used for this should be separate from the live system, perhaps even on its own network, to keep response times short. We do not generally recommend using a vendor's remote training or demonstration system for the CRP – sometimes done.

  There are too many differences, data issues, and other factors that can seriously reduce the effectiveness, relevance and efficiency of the CRP. If such a setup can be uniquely configured to work like a live system for the company, it may work well. Planners need to make sure that all configuration settings and data can be modified, updated, changed, restored to a previous setting, and other aspects needed for effective testing, planning can be performed, regardless of where the data base and servers are physically located.

Now, the implementation team can proceed to the core work of the CRP, detailed planning of the implementation, iterative testing and "dress rehearsals" of the full business cycle, data conversion design and planning, and other go-live preparations that insure a problem-free, no-surprises go-live event and successful transition to the new system.

In another article we cover the major steps of these activities leading up to Go-Live Day.