

Lessons Learned – Keys to Managing a Successful System Implementation Project

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Presenter:

■ Lourdes Godfrey

- Strategy Consultant, Booz Allen Hamilton
- 20+ years ERP system implementation experience
- 15+ years IT project management experience

Key Success Factors to Effective Project Management:

TOP 10:

- Effective Project Management
- Realistic expectations
- A realistic project plan
- Dedicated, knowledgeable resources
- Recognize risks & plan accordingly
- Stakeholder Management
- Team Management
- Change Management
- Test everything
- Communication

1. Effective Project Management

1. Initiation and Planning

- Realistic expectations
- Realistic Project Schedule
- Getting the right team together
- Risk Identification & Planning

2. Executing and Controlling

- Stakeholder Management
- Team Management
- Change Management

3. Communications

- Effectiveness
- Leadership

2. Planning - Realistic Expectations

Project Charter and Business Case should contain:

- **VPOS** – Vision, Problem, Objective and Scope
- Objectives should be **measurable**
- **Scope** – what IS and what is NOT in scope:
 - Organizational
 - Technical
 - Business Process scope
- **Realistic benefits** – i.e. expectations
- Break large project down into manageable chunks or phases
- Define change control policy and procedure

3. Planning - Realistic Project Plan

- **Involve everyone** in planning process
- Develop **Work Breakdown Structure** at detailed deliverable level
- Determine appropriate skills / **staffing needs**
- Determine **dependencies**
- Define **limitations** – people, time & \$\$
- Include **contingency** and define how will be used
- Consider “**time boxing**” project phases – forces discipline
- Develop risk and issue management plans
- Develop communication plan
- Develop change management plan

4. Planning - Dedicated, Knowledgeable Resources

- Assign knowledgeable Team Members who will be **empowered to make decisions**
- Team members should understand current challenges as well as be **visionaries**
- Team members must be **100% dedicated**
- Use **back-fill** resources if necessary to free up team members' time
- Assign **“Subject Matter Experts (SME’s)”** to support team members in areas that are not their area of expertise

5. Planning – Issue & Risk Planning

- Know the difference between Issues & Risks – Issues are risks whose time has come
- Risks:
 - Identify risks early and rank them
 - Assess probability & impact of each risk
 - Identify contingency plans for high impact risks along with triggers to activate
- Issues:
 - Assign an owner for each issue
 - Issue owner develops action plans to address their issues
 - assign responsibility and target dates for each

6. Executing - Stakeholder Management

- Form an **Executive Steering Committee**
- Include key Executive Stakeholders
- Define **roles & responsibilities** of Steering Committee members
- Assign overall responsibility to the project sponsor
- **Involve stakeholders in key decisions**
- Use them to get the organization behind the project
- Constantly **manage expectations** – use project charter and scope statement
- Update Steering Committee monthly on progress / issues – communication plan

Sample Organization Chart of Key Stakeholders:

Global Steering Committee



Sample Organization Chart of Key Stakeholders:

Global Process Teams:

Global Steering Committee

AP / PO
Global Process
Owner

AR / Billing
Global Process
Owner

Accounting & Financial
Reporting
Global Process Owner

Global Process Team:

- UK AP & PO
- S. America AP/PO
- Spain AP/PO
- Internal Audit
- N. Amer. AP/PO

Global Process Team:

- UK AR/Billing
- South America
- Spain AR/Billing
- Internal Audit
- N. Amer. AR/Billing

Global Process Team:

- UK Mgt. Reporting
- South America Mgt. Reporting
- Spain Mgt. Reporting
- Corporate Consol. Reporting
- North America Mgt. Reporting
- Internal Audit

Sample Stakeholder Roles and Responsibilities:

Step	Task	European Steering Committee	European Program Manager	European Process Owner	European Super Users	Global Steering Committee	Global Program Manager	Global Process Owner	Global Process Team
1	Agree Global Project Structure and Approach	✓				✓			
2	Develop list of design options & brief description, grouped by those to be defined Globally, Locally, or Both.		✓	✓			✓		
3	Agree recommended global / local policy splits in #2	✓	✓	✓		✓	✓	✓	
4	Develop first draft recommendations for global design based on agreed list.		✓	✓	✓		✓		
5	Review recommendations and provide suggestions / alternatives.						✓	✓	✓
6	Agree recommendations.			✓				✓	
7	Prototype finalize global design.	✓	✓	✓			✓	✓	
8	Global design sign-off	✓	✓	✓		✓	✓	✓	

7. Executing – Team Management

- Ensure team recognizes the difference between project work and on-going maintenance
- Link projects to strategy
- Motivate: “Strategy is Execution” – Colin Powell
- Resolve issues
- Manage the plan:
 - Capture actual hours/costs vs. planned hours/costs at the detail level
 - Analyze variances
- Weekly progress meetings:
 - Accomplishments
 - What did not accomplish but should have
 - Issues / Risks

8. Executing - Change Management

■ Process Changes:

- Identify processes that will change early, and define new processes including new roles & responsibilities
- **Link to Strategy** as well as to Objectives in Scope
- **Ensure executive support** for process changes
- Culture / People change requires leadership – use **key stakeholders to communicate and lead process changes**
- **Document** process changes & **test during UAT**
- Communicate, communicate, communicate!

■ Change Request Management

- **Identify CR process early** – include cost justification
- Ensure **executive support** for CR process
- **Strictly enforce** CR process

9. Executing - Test Everything!

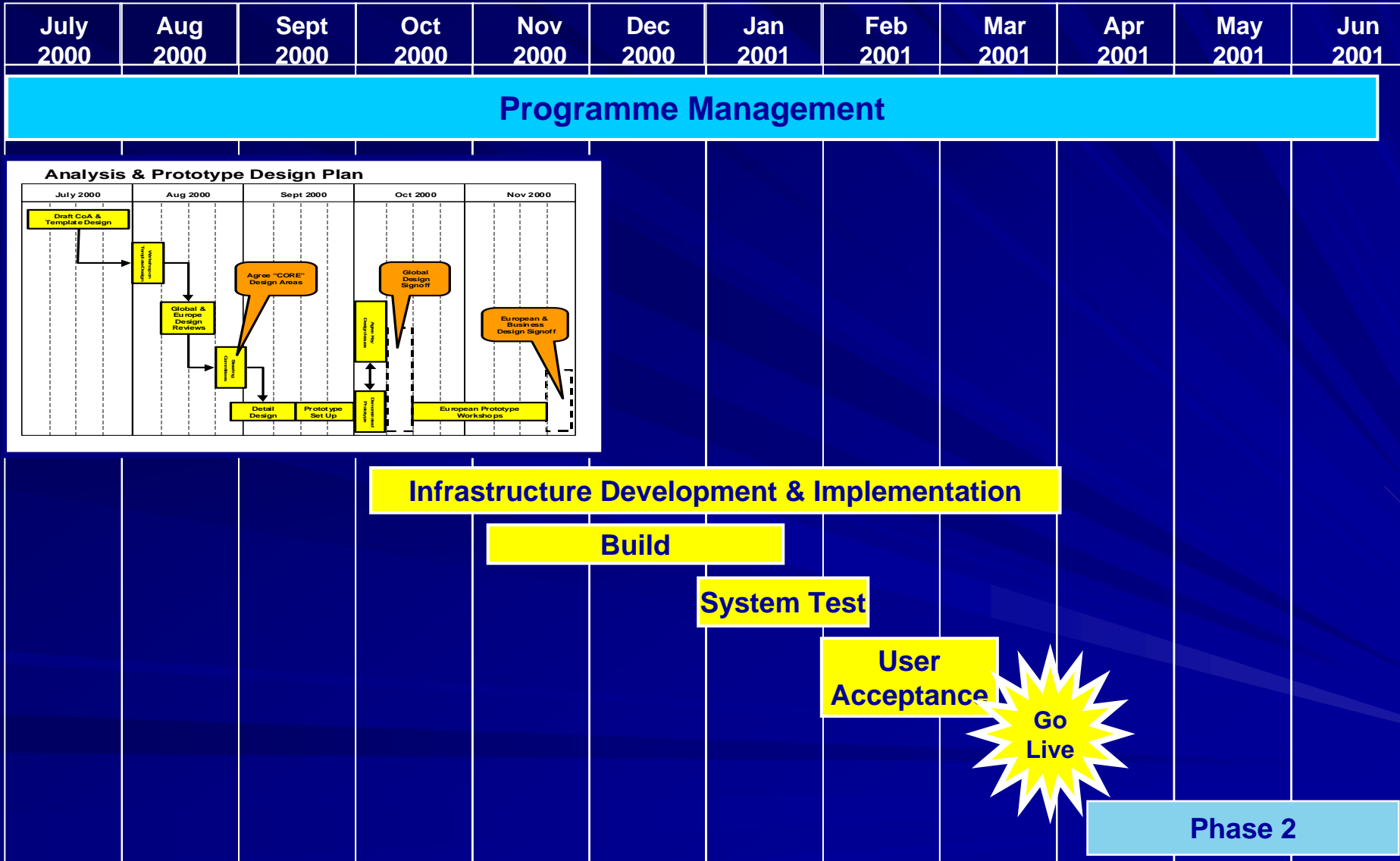
- Business Processes
- User Documentation
- Policies & Procedures
- Security
- Interfaces
- Converted Data
- Error handling & correction
- Disaster Recovery
- Stress test (people & systems)

10. Communication:

Communication Tool Kit – have at your fingertips:

- **Charter / Business Case** – expected business benefits, scope and objectives
- **Project schedule:**
 - Summary “one pager”
 - Milestone chart – list significant milestones and dates
 - Detailed schedule
- **WBS**
- **Responsibility matrix:**
 - At Milestone level
 - At WBS level
 - Project Organization Chart
- **Up-to date Issues List, Risk List, and change control list**
- **Current Status Report**

Sample “one pager” project plan – for communication



Thoughts on Leadership:

- Strategy is execution! *Collin Powell*
- Execution is Project Management! *Lourdes Godfrey*
- I am more afraid of an army of 100 sheep led by a lion, than an army of 100 lions led by a sheep. *Tennyson*
- Battle Planning is like Project Planning. However, Generals do not “manage” troops into battle, they **LEAD** them into battle! *Bill Stewart – PMLG*
- Change Happens! *Lourdes Godfrey*
- There is no such thing as a project without issues or risks, unless the PM is not aware of the issues or risks, which by definition is an Issue! *Lourdes Godfrey*
- Always help others get ahead, you will stand taller with someone else on your shoulders. *Bob Moawad*

Questions ???



Contact Information....

- Lourdes Godfrey
 - Booz Allen Hamilton
 - **256-922-6390** (office)
 - 256-606-4020 (cell)
 - Godfrey_Lourdes@BAH.com