

The Value of Strong Client Resources

Despite the many articles written over the last few years on the need for strong client resources, this remains one of the most overlooked (and needed) components of any successful implementation. This becomes very evident in the field of third party integration.

Integrators face many challenges over the course of a software implementation; ensuring that strong client resources are available to the integrator is a primary challenge. Too often, what could have otherwise been a successful implementation is derailed by either a lack of communication between the integrator and the client or the actual expectation of the client. These expectations can be broken down into three critical areas:

Operational / Business Unit Knowledge – A third party integrator’s job is to leverage their experience with the software and its uses within the industry, and bring that into play within the scope of the implementation for a specific client. It is imperative that the client have a thorough knowledge of the business and its operations. This knowledge should be communicated to not only the integrator, but the software vendor as well. All parties involved in the implementation should have a clear understanding of the impact of the software as well as the inevitable changes it will bring to the client’s business operations.

Systems Knowledge – Many clients have a variety of legacy systems and custom tailored interfaces within the systems infrastructure of their business. During the initial stages of an implementation, this information is gathered and assimilated by the vendor and the integrator to ensure that the software will meet the client’s needs and expectations. The information gained during the assessment stage is imperative to ensure that deliverables are met in a timely manner.

Inevitably during the course of an implementation, gaps will be identified that were missed during the beginning phases of the project. It is at this point that solid systems knowledge on the client side needs to be in place. The client resource can assist the integrator and vendor in determining the best steps to bridge the identified gap, and ensure minimal impact to existing systems and interfaces.

Client Side Project Management – While last on the list, this is far from the least important. In fact, strong arguments could be made that it is the most critical



area of the implementation. While the integrator and the vendor have an influence on the direction and eventual outcome of the project, it is the client PM that ultimately controls the client resources allocated to the project. Expectations and deliverables need to be clearly outlined during the original design and project planning sessions, with the client PM taking an active role in working with the integrator and vendor to ensure that all deadlines are communicated and met during the life cycle of the implementation. Constant communication between all invested parties should be funneled through the PM and review sessions of the implementation's progress scheduled on a regular basis. Ultimately, it is the Client PM that will ensure that all client side tasks are met and that the key resources listed throughout this article are available and assigned when appropriate. The integrator PM and the client PM will often work together in this task, with both PMs driving toward key decisions being made during the project. Delays in decision making and resource allocation are commonplace during the design phase, and this is where the importance of the PM role becomes most evident.

Perhaps the best method of ensuring that these resources are in place and that the implementation is a successful one is to utilize what is sometimes referred to as the 'AWR' process. AWR is an acronym referring to the simple execution of an 'ASK', 'WRITE', and 'REVIEW' that occurs during the initial software selection

and design session of an implementation. This process is often used as well during scheduled meetings to monitor project milestones. AWR is broken down as follows:

ASK

- Ensure that all affected parties within the implementation are consulted
- Consult different business groups individually and not in one meeting. (this helps to ensure that no outside influences are brought into the conversation, and that significant attention is given to each group's requirements)
- Search for process and system gaps, and ensure that they are clearly identified
- Always ask questions with the client's end result in mind, and make sure that the conversation stays 'on track' and applies to the desired product and ROI.

WRITE

- Ensure that the language used is one that is easily understood by the client, vendor and integrator. If need be, create a glossary, and review with all parties so that everyone understands the terminology.
- Map out all expectations and deliverables within a functional design document and project plan.
- Ensure that all deliverables within the documentation are tracked back to specific individuals and that timelines are assigned.

- Verify that each task meets a certain project requirement that ultimately supports the implementation needs.
- Keep the end goal clearly visible, with a tentative date. (To get there, you have to sometimes remind people of where they are going, and when it's going to happen)

REVIEW

- Make sure that all parties are involved in the review process and give them the time to 'walk away' and absorb everything that has been discussed.
- Encourage conversation and debate (if needed) so that the requirements are clearly understood by all involved.
- Have someone on the client side outside of the project team read it. See if it makes sense to them. Ideally, you want the expectation and design so clear that almost anyone within the organization can understand at least the basic goals and the scope of the project.
- If need be, rewrite it. Make sure it means what it is supposed to mean. Have the vendor, the integrator, and the client sign off on the document, ensuring that all parties understand what is expected and the deliverables.

At the end of this process, the client should have a clear understanding of the project needs, and the expectations that will be placed on them. The client can now walk away and begin their

end of the project planning process. Resource planning will begin, possible conflicts addressed, timelines adjusted, and a final project plan with clear and realistic expectations can be put into place for all parties involved. The client will now know what is expected and can deliver on their end, working with both the vendor and the integrator to ensure that a successful implementation occurs.

Armed with the knowledge above, the client can also assess their current resources allocated to the project. Particular skill sets and experience can be evaluated in relation to the project needs with the integrator. Often, the talent and knowledge of the resource is more important than the actual number of resources assigned. A resource with years of experience in a particular field critical to the implementation, can be more effective and cost efficient than that of two or more 'junior' resources with little or no experience, but who have the time available for the project. This approach ensures that the ideal resources are put in place so that the implementation is executed in the timeliest and most cost effective manner possible.

Another tool that is helpful in clearly defining expectations and ensuring that the needed client resources are in place is a proven methodology.

Most integrators have developed such methodologies, and through practice, have refined them to a point where they are adaptable to most clients. A methodology will build off the AWR process, and help guide the client in the needed direction for a successful implementation. It is a road map of sorts that all parties involved can use during the course of the project.

Too often, implementations become a numbers game where the planning revolves around the number of needed resources. Once a project plan is established, the tasks are established with an hourly value attached. The client falls into the trap of assigning any number of resources that have the time available, without evaluating their internal strengths and weaknesses. This inevitably leads to an implementation that has the correct number of resources, but not necessarily the strongest resources and approach in place. By following the AWR process this can be avoided.

Once the integrator has guided the client through asking the appropriate questions, documenting (writing) the project needs, and 'reviewing' those needs and resource strengths, the client has a clear and concise picture of the expectations of them. Armed with this knowledge and a proven implementation methodology provided by the integrator, the

client is now prepared to utilize all the tools provided in this article for creating a road map to success. It is this approach, and the recognition of the need for strong client side resources that lead to a tailored and successful implementation in any field.

This article is authored by Kevin Holmes at enVista. For more information, please contact us at 877-684-7700 or inforequest@envistacorp.com.