



KICKSTARTING YOUR AMS

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IMPLEMENTATION IDEAS FOR NEW SYSTEMS OR UPGRADES



Selection

Completed



Implementation

Discovery

Setup

Testing

Training

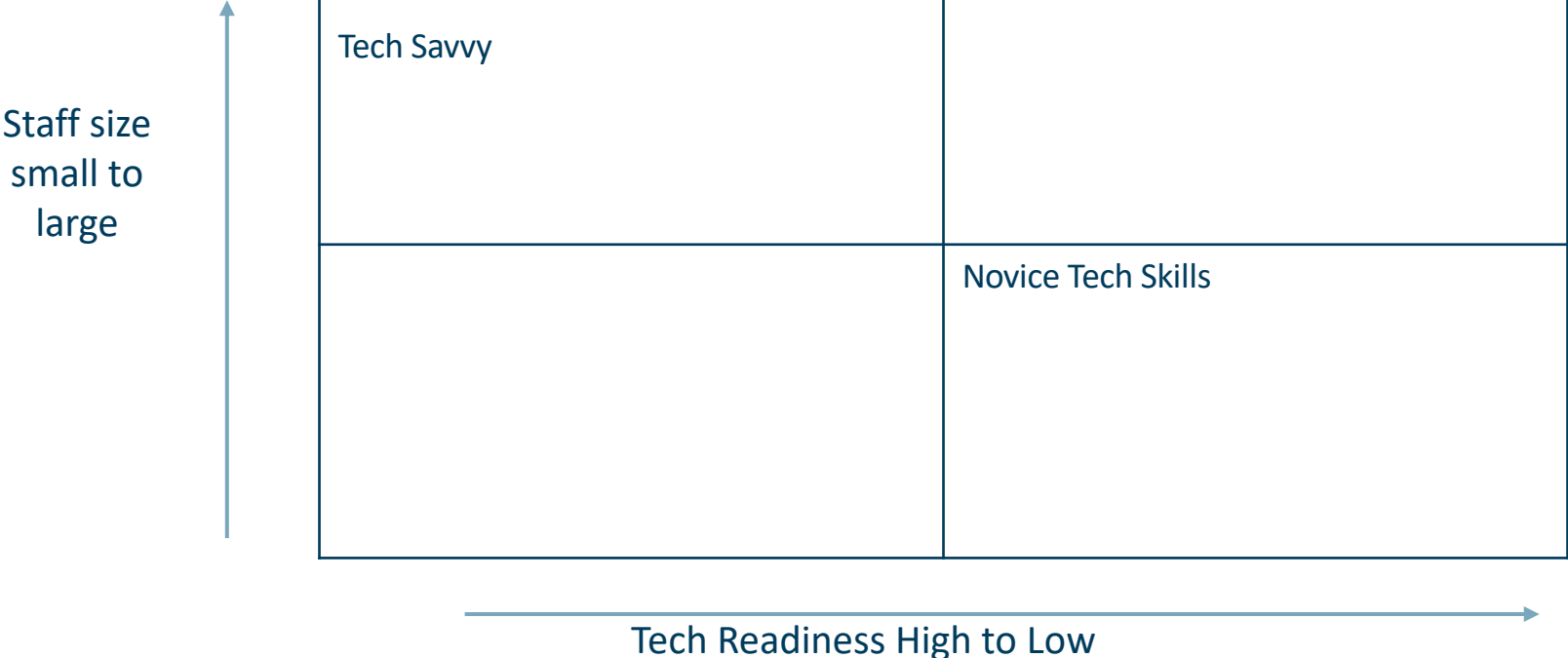


Launch

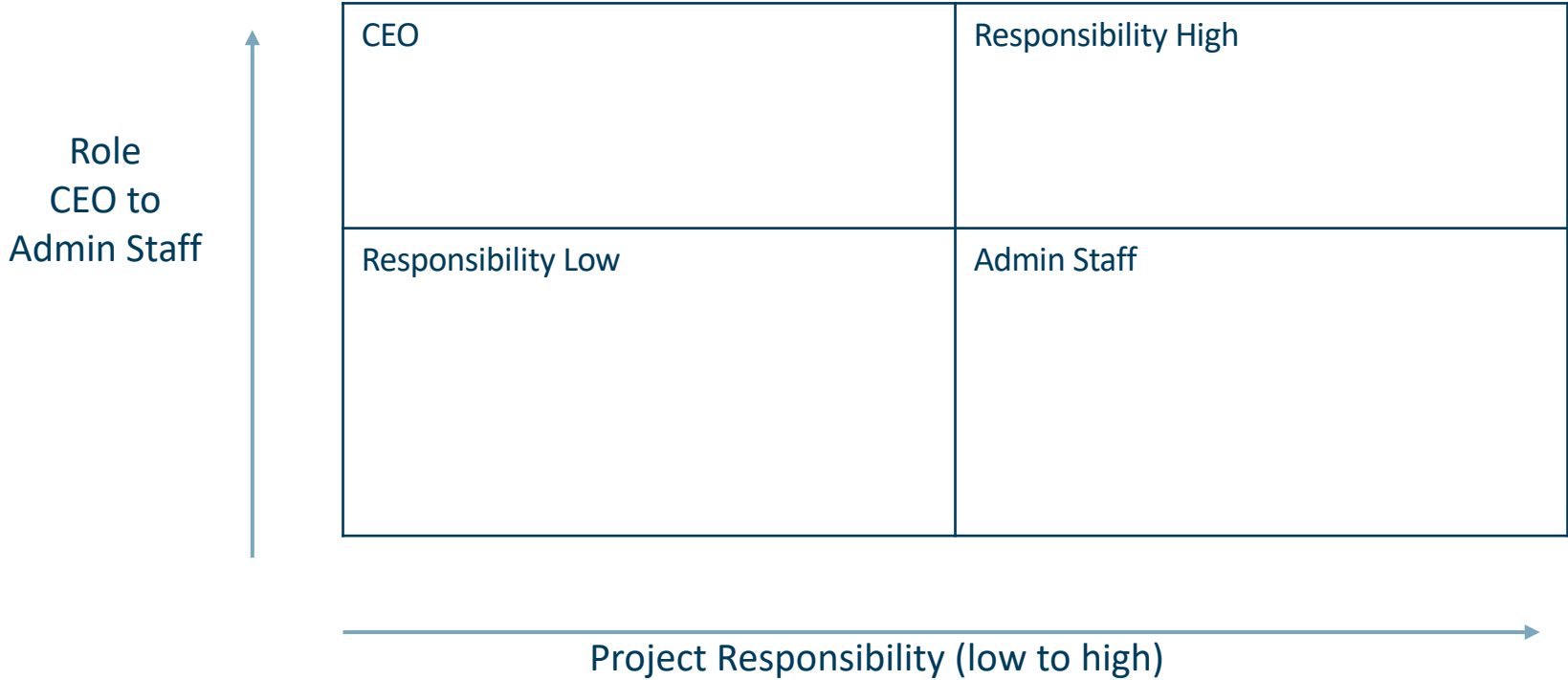
Adoption

Phase 2, 3

WHERE DOES YOUR TEAM FIT – SIZE VS READINESS?



WHAT IS YOUR ROLE AND RESPONSIBILITY FOR THE PROJECT?



TOPICS TO COVER

- PM 101
- Find Your Voice
- Make Change Work for You
- Pace Yourself

Own project planning

Task	Association	Vendor
Project Charter	X	X
Project Plan*	X	X
Communication Plan*	X	X
Risk Management*	X	X
Requirements*	X	X
Data Conversion	X	X
Testing	X	X
Training	X	X

PROJECT CHARTER

Summarize the project

- Purpose/Objectives
- Alignment with Strategic Plan
- Sources of data
- Acceptance criteria
- In/out of scope
- Deliverables
- Resources
- Budget
- Milestones

Project Charter Template

Project Name: _____	Project Number (if this is an IS project): _____
Project Leader: _____	Date Submitted to Sponsor: _____
Sponsor: _____	Anticipated Date of Completion: _____

Objectives, Outcomes, Data

Project Purpose/Objectives

Scope: what is and is not within scope of project

Alignment with Strategic Plan:

Sources of data used to inform decision making:

Measures/acceptance criteria to evaluate outcome:

Final deliverable(s):

Customer (for whom project is being developed):

Customer needs and priorities:

CREATE A TEAM

Include _____

Include _____

Team: _____

Staff Role	Name	Blocker?

WHY IS RACI IMPORTANT?

Responsible

- The person who actually carries out the process or task assignment
- Responsible to get the job done

Accountable

- The person who is ultimately accountable for process or task being completed appropriately
- Responsible person(s) are accountable to this person

Consulted

- People who are not directly involved with carrying out the task, but who are consulted
- May be stakeholder or subject matter expert

Informed

- Those who receive output from the process or task, or who have a need to stay informed

ROLES

The discussion of roles is as important as the chart. Only 1 A (Accountable)

Activity	Project Sponsor	Project Manager	Business Analyst	Technical Resource	Development	Support (IT Support)	Customer Services/Member Serv.	MarComm	Finance	Executive	Programs	Vendor PM	Vendor Technical Resor.
Project Planning	C	A	I	C	C	C	C	C	C	C	C		-
Project Initiation	C	A	I	I	I	I	I	I	I	I	I		-
Project Charter	C	A	I	C	C	I	I	I	I	I	I		-
Stakeholder Registry	C	A	C	C	C	I	C	I	I	I	I		-
Stakeholder Analysis	C	A	C	C	C	C	C	I	I	I	I		-
Develop Customer Features and Functions	A	C	R	R	R	R	R	R	R	R	R		-
Develop Customer Requirements	R	A	R	R	R	R	R	R	R	R	R		-
Develop Use Cases	R	A	R	R	R	R	R	R	R	R	R		-
Gather report requirements	C	A	R	C	C	C	C	C	C	C	C		-
Develop Project Documents (RFP, RFI, etc.)	C	A	I	R	C	I	C	I	I	I	I		-
Develop Demo Agenda (with use cases)	C	A	R	R	R	R	R	R	R	R	R		
Participate in Demos	C	A	R	R	R	R	R	R	R	R	R		
System Review/Fit Analysis	A	C	R	R	R	R	R	R	R	R	R		
POC for AMS vendor	C	I	I	A	I	S	I	I	I	I	I		-

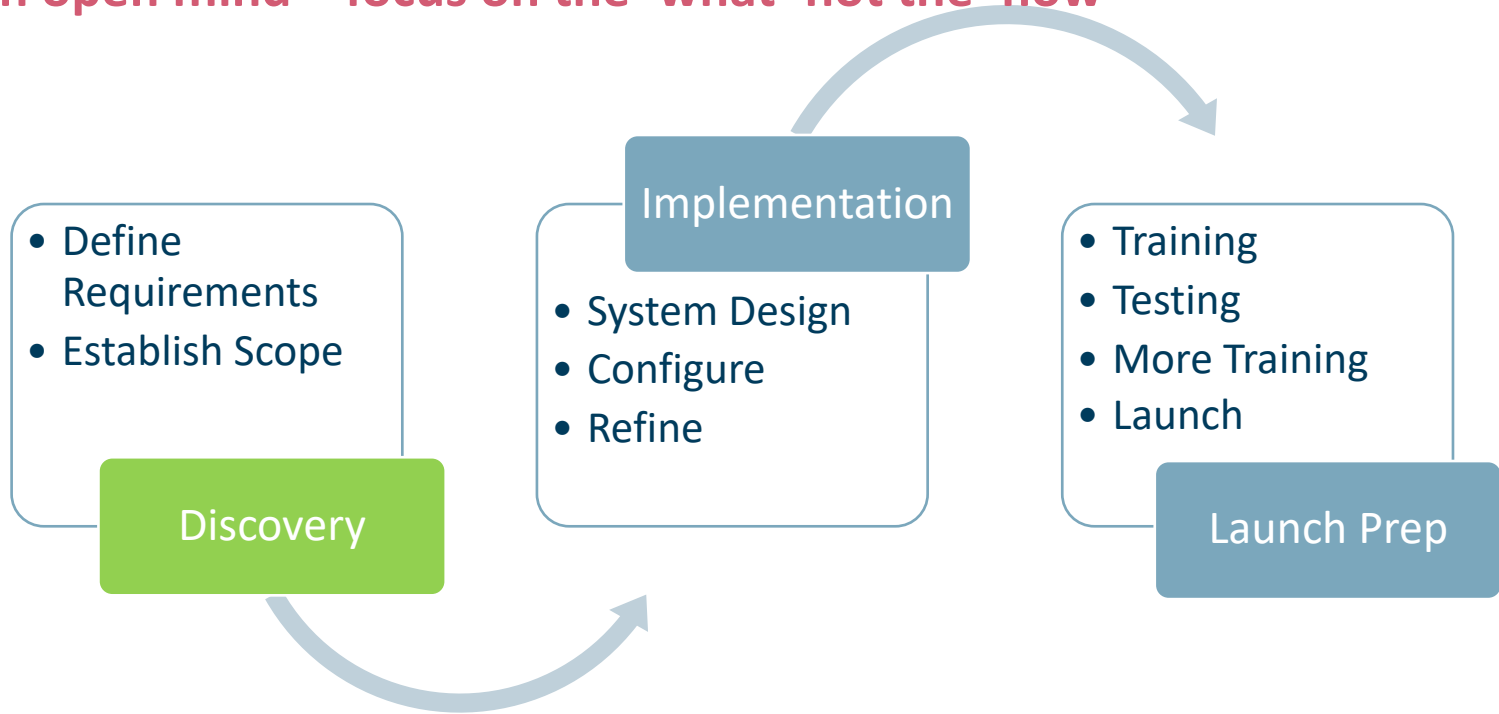
TEAM COMMUNICATION

Own your communication assets

Task	Association	Vendor
Project Management	Planner, Excel	Asana, Wrike
Document Storage	SPO, Drive	Internal File System
Requirements	Excel	JIRA
Workspace (central location of all docs)	SPO/Intranet	Confluence, Client Dashboard
Chat	Team, Slack (for Assoc)	Slack (for Vendor)

FIND YOUR VOICE

Keep an open mind – focus on the ‘what’ not the ‘how’



REQUIREMENT IDEAS

Requirements

Can you explain your business rule to a stranger?

What are the exceptions for small groups or individuals?

Is it written for the legacy system?

How does the vendor work?

What process does your vendor use?

User Stories

User stories expose the detailed requirements.

They highlight the business reason for each functionality.

User stories are testable.

As a <user>, I want to <action> so that <benefit>.

For example, "As a customer, I want to register online, so that I can pay immediately with my credit card."

Scenarios

Tell a story using requirements.

Provide a sample of an important event (registration form).

Describe the registration process.

Outline special pricing (speakers, guests, group reg).

Outline materials needed (confirmation, reminders).

REVIEW REQUIREMENTS

Is it reasonable?

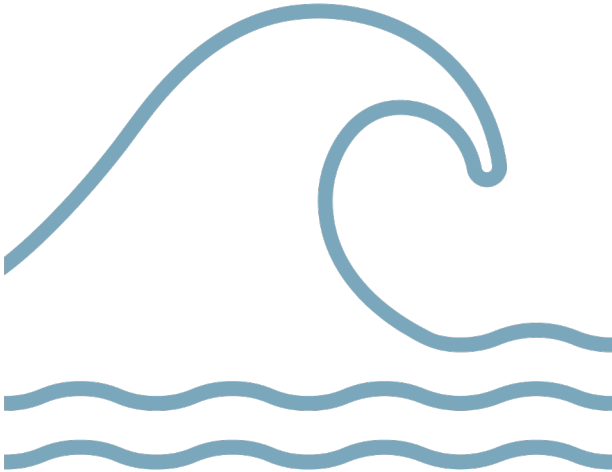
Is it testable?

Is it a single requirement/single answer (baseline Y or N)?

Can a stranger understand it?

- Add context. Vendors don't know all the facts about your 'special' process

GET AHEAD OF THE DATA WAVE – DON'T WAIT FOR DATA CONVERSION DAY!!



NEGOTIATING DATA AND REPORTS



Ask: What are you going *to do* with the information once you have it?

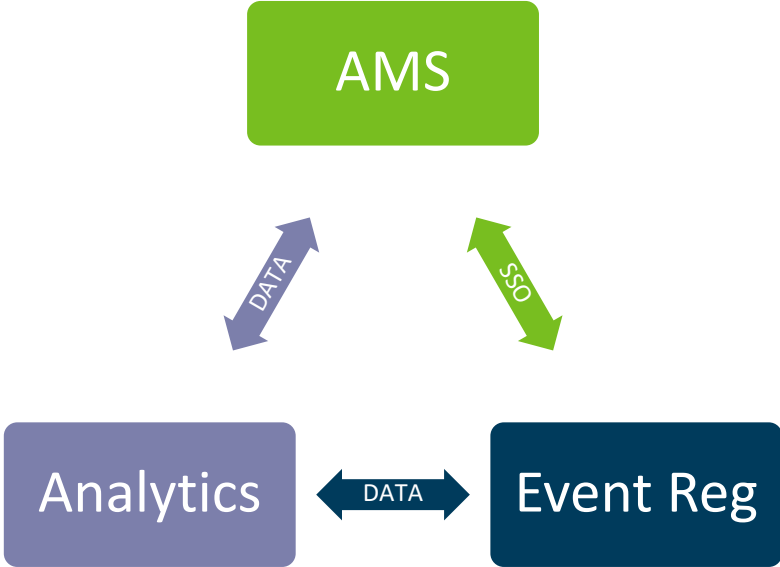
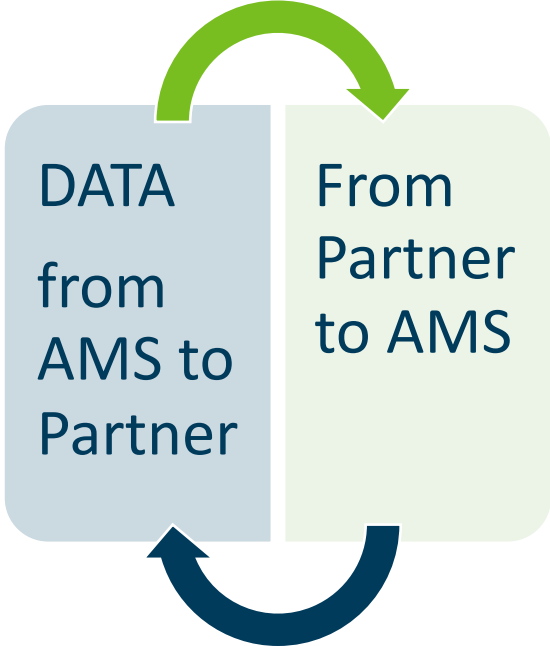


Ask: Will the information be used to make business decisions or drive deeper analysis?



Ask: What is the best "user experience" – should we burden our members with long forms collecting information we'll never use?

THE DATA MUST FLOW



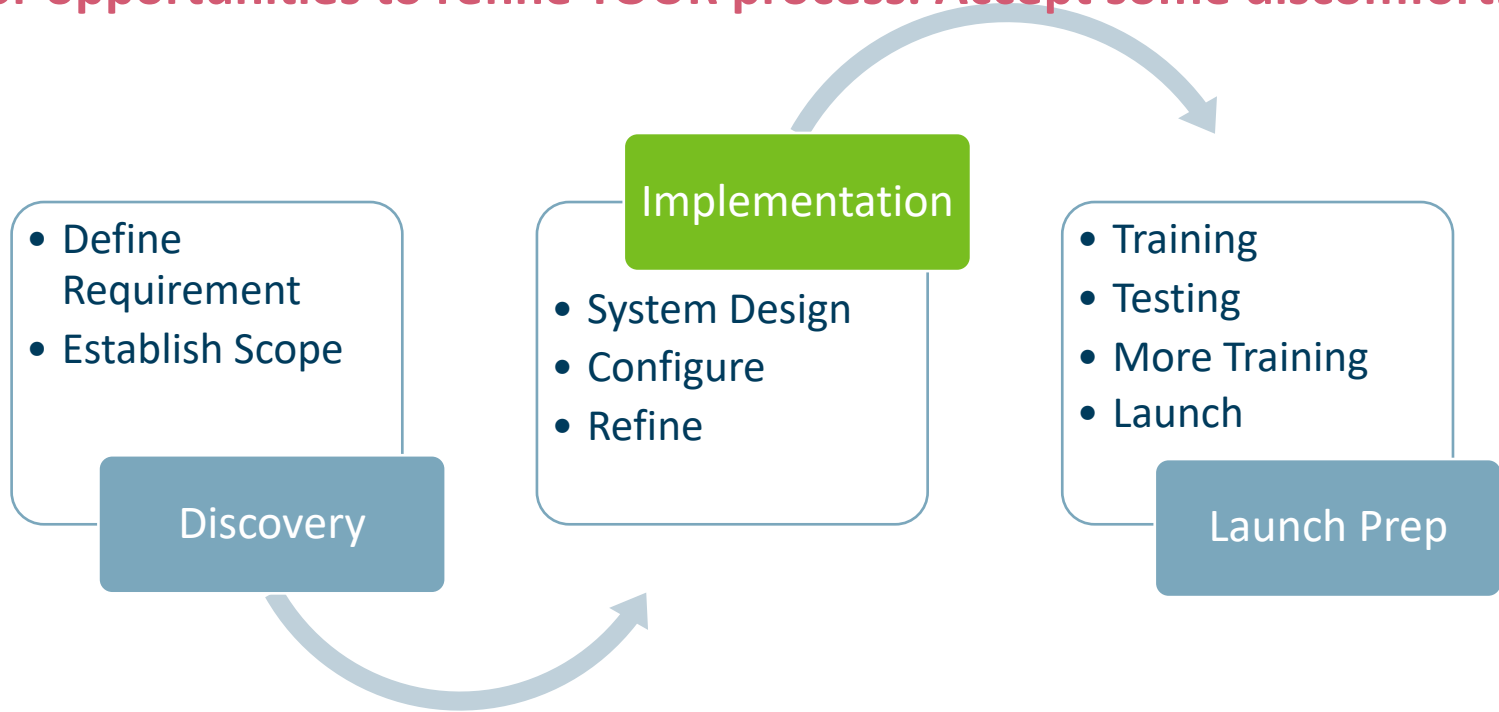
SPARK JOY – DELETE INFO



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MAKE CHANGE WORK FOR YOU

Look for opportunities to refine YOUR process. Accept some discomfort.



IS EVERYTHING *REALLY* MANDATORY?

Scope Creep Alert: Challenge yourself to stay focused

Focus on must have – deal breakers

Highlight functionality that is missing from current system

Identify features you need to maintain (e.g., certification, group registration)

SIMPLIFY AND ADJUST PROCESSES

Look for every opportunity to rework manual or complex processes



Pro/Con of using ALL baseline



Start with the core for your organization Contacts, Finance, Members and ??



Evaluate “cost” of complex config or customization



What can wait?

TEAM ADJUSTMENTS - IMPLEMENTATION



Add SME to participate in system setup



Add SME/Staff to assist with testing



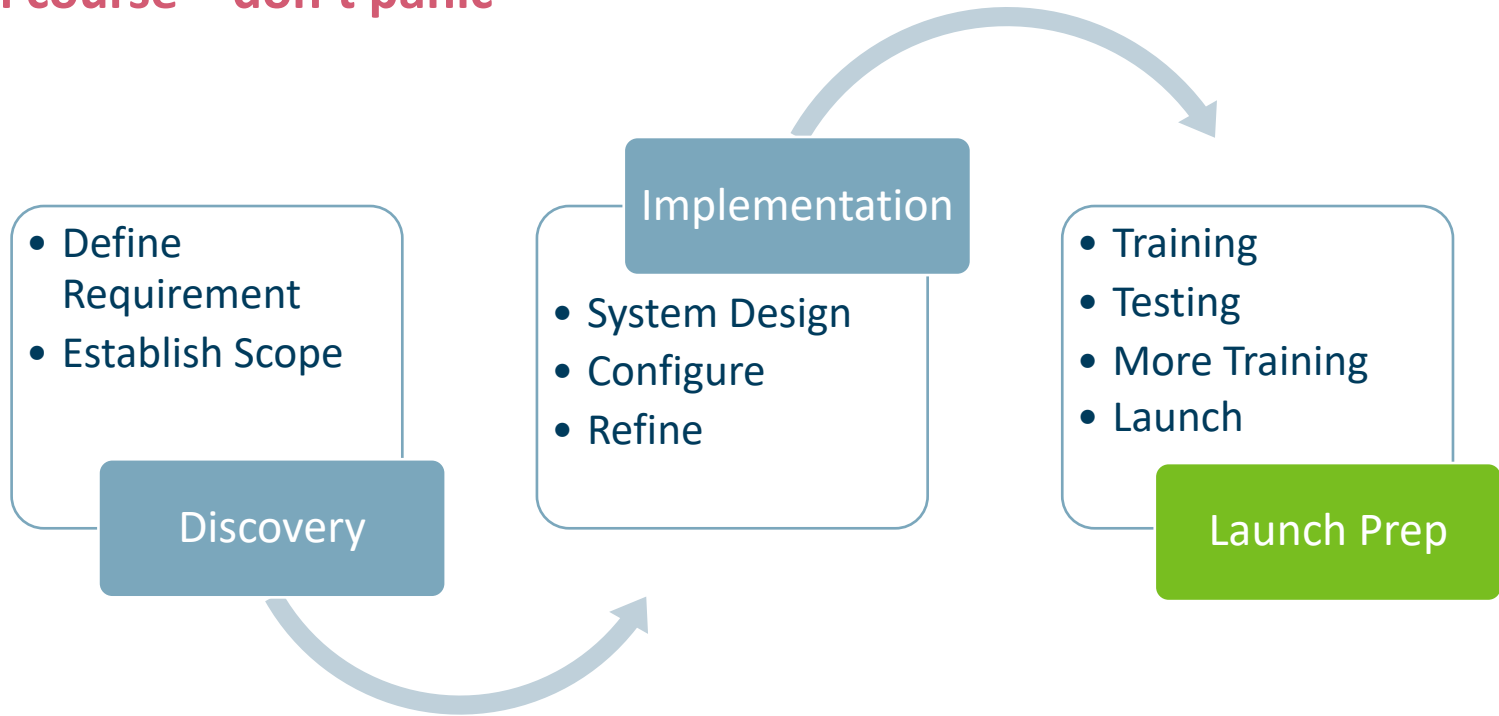
Adjust workload for Core Team



Consider back-up, if possible

MAKE CHANGE WORK FOR YOU

Stay on course – don't panic



PHASE 2 – POST LAUNCH

Revisit parking lots and phase 2: Honor the trust of the team

Honor Phase 2 and create a budget

Phase 2 if:

- Low volume/low risk
- Function in future release
- Need to learn more about the system to configure

TESTING HACKS

Vendor tests for errors – Association tests for function

- Start with vendor bank of testing scenarios
- Use base of standard use cases to become familiar with the system
- Layer in difficult items or advanced config
- Break sessions into small chunks with a study buddy
- 1 person reads the case and documents, the 2nd person performs
- Understand automation
- It's only to check breaks – not business processes



TRAINING HACKS

Expect to adjust – the more you learn, the more you can do

- Training throughout the project
 - Before Discovery
 - Before a sprint or delivery
 - Before Launch
 - After Launch
- Micro learning, short sessions over time
- Hands on learning
- See, Do, Teach



Listen for signs of a healthy project and signs of struggle





Unexpected

Listening for

- I think I found a good option
- I need a break but I'm still here
- I think we can defer this decision
- Balanced discussion
- Helping each other



Listen, Coach, Recognize

Listen

Process

Adjust



Unexpected

Listening for

- I can't...
- Sudden annoyance with a team member....
- The system doesn't...
- Lack of comments (too quiet)...
- I thought we were going to....



Stop, drop and roll

Listen

Process

Adjust

C-SUITE CONNECTION

Start this peer-to-peer connection now

- Confidential, yet known
- Talk, not email
- Speak up!



TRANSITION FROM LAUNCH TO ADOPTION

Build rest and adjustment breaks into the plan

1. Stabilization Phase (6 months)
2. Keep learning
 - Advanced Training
 - Adjust
 - Add features/functions
3. Governance
 - Systems
 - Data



THE WORK WILL PAY OFF!



Work the plan



Start with the end in mind



Adjust the Core Team at each phase Consider adding Data as part of 'Core Team'



It's a marathon not a sprint

WHAT QUESTIONS DO YOU HAVE?



KEEP IN TOUCH!

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