Tech Notes

Avoiding "Gotcha's" – Tips and Techniques that Drive Successful Implementation Projects

By Roy Altman, Peopleserv, Inc.

T he initial euphoria of landing that "best-of-breed" system often gives way to the harsh reality of the implementation project. HR software is complicated and implementation projects are often difficult. There are many reasons why projects fail or are needlessly painful. They tend to fall into one of two categories: general project management issues, which apply to all types of projects, or the "gotcha's" – aspects unique to the type of system that is being implemented. Successful project management is more than just tracking project plans and compiling status reports. Anticipating and then conquering the "gotcha's" can make or break even the most disciplined approach to project management. This article will focus on ways to avoid common pitfalls that can undermine all types of HR system implementation projects.

Get Buy-In

The success of any project depends on getting executive sponsorship at the onset of the project. Stakeholders must know that for the benefit of the company, management has chosen to implement the system. All too often there is

resistance to the adoption of a new system. There is a tendency to be afraid of change, in particular, change in business processes that the system is meant to improve. Overcoming resistance to a project at the beginning is important to getting everyone on board and working toward a common goal. Having face-to-face meetings with the stakeholders is also very important in this phase. Psychological research suggests that more than 50 percent of communication is non-verbal.[1] You don't get to see the facial expressions and body positioning, which reveal much about a person's motivations. It is also harder to resist someone when they are in front of you. Finally, it must be stressed to stakeholders that the project will succeed or fail for all, promoting a sense of teamwork. Upper management has decreed that it will be done, so finger pointing after project failure will not benefit anyone.

Plan Early and Often

Create a project plan right off the bat, even if you don't fully know the scope. Plan for the longest reasonably expected project duration in order to set the stakeholder's expectation of the worst-case scenario. After an initial discovery phase, revise the project plan to reflect the true scope. However, plan for contingencies! It's a good idea to build in extra time for revisions of the functional specification and creation of a comprehensive test plan.

At each milestone of the project, update the project plan to reflect the current status. This will create a sense of trust between you and your client and keep expectations aligned with reality. Identify risks or problems early and devise a plan to overcome or mitigate them. And don't shy away from using that contingency time in the project plan if you need it!

Don't Automate Chaos

If your processes currently result in chaos, and you automate them, you end up with automated chaos. Putting in a new system is an opportunity to re-examine your processes and improve the ones that are sub-optimal. Getting advice from industry experts on best practices could be helpful. Beware, though, that sometimes "best practices" could be a euphemism for "what's easiest to implement." Get the stakeholders to clearly articulate what the critical requirements are, and the priorities among them.

Know Your Organization

Work force management business processes involve routing various transactions for approval through work flow, i.e., absence requests or timesheet approvals. These processes depend on supervisor or approver information to exist in the system. This information is usually fed from the

HR system, where it is maintained. Although the HR system is the system of record, other applications (such as Talent Management or Work Force Management) rely on the accuracy of this information. There is a temptation to maintain this information separately in each of those systems. But beware, keeping the organizational hierarchy synchronized across multiple systems is difficult. Given the challenges of keeping it current in one system, imagine the complexities of synchronizing across multiple systems! For an in-depth discussion on how to effectively address this issue, please refer to my article "Organization Modeling for the Real World," in the February/March, 2008 issue of *IHRIM.link*.

Don't Reinvent the Wheel

Every client's organizational requirements and processes are unique. Yet, very often, those differences tend to be remarkably similar. When addressing customizations or modifications to the software in order to fit your stakeholder's needs, keep an eye out for how the requested function can be generalized to fit similar requirements from other clients.

Look for comparable modifications that have been done for other customers in the past. Look to generalize and parameterize the past modification or customization in order to be applicable for the current and future clients. What one client wants will most likely be requested by another – or has been requested in the past. Leverage work that has been done. If you're doing new work, ensure that it can be leveraged in the future. The only rule about business processes is that they change. To accommodate this, provide the business user with the capability to modify parameters as they change without having to involve technical consultants.

Getting Testy

A comprehensive test plan is the secret to a successful project. This bears repeating: *A comprehensive test plan is the secret to a successful project.* The user should sign off on the test plan. A test plan constitutes acceptance criteria. Treat it as a binding contract. If the user accepts the results of each test scenario, it is tantamount to accepting the system (require a formal sign-off, anyway). Make sure your business users understand what they are committing to when they sign on the dotted line!

That Creepy Feeling

The Achilles heel of most projects is the dreaded *Scope Creep.* Scope Creep occurs when new requirements are revealed at the 11th hour, wreaking havoc on schedules and budgets. In the interest of keeping the customer happy, many implementers will attempt to accommodate new requirements, which often results in massive overtime. You must be firm! Scope Creep not only puts the project at risk, but also is detrimental to the health and well being of the implementers (not to mention their marriages).

> The best way to avoid Scope Creep is by having a comprehensive test plan, as described above, as a way of enforcing acceptance criteria of the agreed-upon scope.

The best way to avoid Scope Creep is by having a comprehensive test plan, as described above, as a way of enforcing acceptance criteria of the agreed-upon scope. However, even when the best of intentions and techniques are followed sometimes new requirements do crop up. It is imperative that a change management process be in place to handle these situations. A change in requirements after sign-off *will* affect the budget and *will* affect the project plan. It is important that the client recognize this. It serves no one if the project fails. The change management procedure should be communicated to the client early in the process and adhered to rigorously.

Keep Talking

It is important to keep the lines of communication open throughout the project. To that end, employ a governance procedure involving periodic status meetings. These can include a separate meeting for the major stakeholders and one for the executive sponsors, if appropriate. The meetings can be weekly during critical phases of the project, backing off to bi-weekly as the project progresses.

At these meetings, responsible parties should report on the status of issues and risks. *These meetings are not to be used to discuss solutions, only to report status!* Many projects de-evolve into "meeting narcosis," where the discussions go on endlessly, and everyone tunes out to the point of losing consciousness. Meetings should be brief and to the point. If an issue requires discussion, it should be taken off-line for the stakeholders to outline possible solutions. Then the solution should be brought to the larger group.

Follow the Leader

A manager is one who essentially convinces people to do things he is not naturally inclined to do. That takes leadership. Shakespeare wrote: "Some are born great, some achieve greatness, and some have greatness thrust upon 'em." The same can be said of leadership. However once you are anointed, success is the only acceptable outcome. Do not confuse leadership with being liked, or being feared. Leadership is about being effective, period. Whether you're the hands-on type or have more of an administrative style, whether you lead by pulling people along, or nipping at their heels like a herding dog, leadership is required for project implementation success.

Conclusion

The list is endless. I invite the readership to email in your own "gotcha's." Once enough are accumulated, they will be published in "Avoiding Gotcha's, Part II."

Making use of these principles will substantially increase the likelihood of an on-time, on-budget implementation project, which will result in satisfied stakeholders. It's important to remember that projects involve people, and the ways in which you deal with people are paramount to their (and your!) success.

> Making use of these principles will substantially increase the likelihood of an on-time, on-budget implementation project, which will result in satisfied stakeholders.

Endnote

1 Renowned Psychology professor Albert Mehrabian has espoused the 7%-38%-55% rule. That is, in any communication 7% of the likeability is transmitted by the words spoken, 38% by the tone of voice, and 55% by the body language. Even though this refers to likeability rather than meaning, establishing rapport and trust is as important, or more important, than the technical details in the success of a project.

About the Author

Roy Altman (Roy@PeopleservInc.com) is president and founder of Peopleserv, Inc (www.PeopleservInc.com). During the course of 27 years of successful implementations, Altman has provided customers with high-value automated solutions. He holds an M.B.A. from Pace University and has taught at Columbia University, as well as other institutions of higher learning. He has authored several published articles on business automation issues: (http://www.peopleservinc.com/articles.htm).