

Software Implementation Methodology

Step 1) Business Justification

Prior to doing anything on a software project there must be a definite business need, a solid value proposition, along with a gain or benefit after implementing the software. ROI.

Step 2) Vendor Selection

Create an evaluation team. This team should comprise of members from top management, functional experts and end-users.

Business Assessment. Conduct an assessment of the current state of the business. Look at critical processes and note what is being done well and what benefits a new system can deliver for these processes.

Software Criteria. Develop a selection criteria to evaluate the available solutions. Criteria can include features, price, platform, and anything else the evaluation team can think of. Group the criteria according to importance to your business, i.e. very important, important, and less important. Assign a score (such as 1-5) to each to make the evaluation easier.

Step 3) Project Kickoff

Assemble the team and identify key resources to oversee the project.

Executive Sponsor. An executive sponsor is a C-level administrator who has a vested interest in seeing the project to completion. Ideally, the executive sponsor should be the highest-ranking manager possible, relative to the size of the project. Successful sponsorship requires a deep understanding of organizational culture and awareness of how the project will help the organization achieve its goals. Part of the sponsor's job is to promote the project within the organization, making sure everyone understands the benefits the project will provide.

Project Management Office (PMO). The primary goal of a PMO is to achieve benefits from standardizing and following project management policies, processes and methods. For the software implementation project, they will be the source for guidance, documentation, and metrics. If necessary, they will get involved with project-related tasks and follow up on project activities through completion. They may report on project activities, problems and requirements to executive management (CEO, CFO, CIO, etc.) to keep these decision makers moving toward consistent, business focused goals and objectives.

Project Manager. The individual responsible for the overall project performance and success.

Functional Leads.

Technical Leads.

Step 4) Process Refinement

The functional leads meet with the business process experts and start identifying all business processes to be included in the software. Identify processes, analyze, improve, document.

Step 5) First Software Build Out

The functional leads transfer the business requirements to the technical team and the technical team begins the work of programming and configuring to meet the business needs.

Step 6) Conference Room Pilots (CRP)

Note all of the passes and fails of each step and also be sure to note any lack of functionality, software bugs or key usability issues. Based on the issues discovered during CRP1, make a list of the top 10-15 critical items to be fixed before the next CRP session. Have the technical team make all of the necessary fixes. Conduct a second CRP session with the users and note the passes and fails of each step along with any lack of functionality, software bugs or key usability issues. Make appropriate changes to the software application.

Step 7) User Acceptance Testing (UAT)

Conduct a thorough end-to-end testing of the software with every business process from every user of the system. User sign-off. Final software configurations

Step 8) Cutover

Step 9) Go Live

Step 10) Post Go-Live Support