

Your Check List for Getting the Most out of your Systems Implementation

- **Get Clear Sponsorship and Support:** Be sure the whole organization supports your implementation and understands the expected benefits.
 - Obtain strong, visible support from the organization's leadership
 - Identify a global owner and key stakeholders of the proposed system who will have access to the appropriate executives and decision makers required to keep the project moving forward towards its desired results
 - Be sure your owner and stakeholders are closely involved in defining requirements, and managing the implementation
 - Take an honest look at people's readiness to accept this new system and related changes. Will there be resistance? If so, look for opportunities to involve the people most affected in the implementation process

- **Clarify your Key Reporting Needs:** Know your information and reporting needs to get the most out of your coding structure. Consider:
 - What questions do we need to answer using data coming from this new system?
 - How do we answer them now? Is there an easier way to derive this information?
 - How can we ensure that our data is accurate, current, and complete enough to support these questions?
 - Is the way we currently classify our information helping or hurting us? What coding structure would make our reporting easiest and most accurate?

- **Define your Business Processes:** You may not want to just automate what you currently do. Think through your business processes and use this opportunity to simplify.
 - Are you happy with the workflows and processes currently in place?
 - What changes would make things easier or reduce errors and delays?
 - Could these changes be incorporated into your system implementation?
 - How could the system's functionality help you streamline your business processes?

- **Document user conventions, processes, and policies.** Consistent data in your system is probably the most important thing you can do to ensure optimal use of your software.
 - Create a centralized coding policy that everyone can find easily
 - Create Naming Conventions for saving reports, templates & queries
 - Define clear coding rules
 - Document data entry standards – identify how critical fields are used, which fields are required and which should be ignored
 - Standardize formatting for fields that do not have automatic edit checking provided by the software itself
 - Perform month end, quarter end & year end quality assurance checks
 - Empower one person in the organization to be your "expert" on how to enter information into your system
 - Keep the guesswork out of things - clarify how to handle questionable data items, resolution of conflicts, and definition of procedures

- **Make using your new system as easy as possible for your users through Training and Support.** People learn differently and need to learn different things – provide a variety of alternatives for system-related training
 - Hold Business Process training, not just software user training
 - Avoid intimidating people with too much information
 - Train a few "specialists" who can support other users so you can keep most people's training as simple as possible
 - Develop quick reference cards for commonly used functions and frequently run reports
 - Consider "personal training" options for busy people who can't make it to a training class
 - Keep frustration and confusion to a minimum - be sure there's an easy way for users to get help

- **Make system information easy to find and use.** The more reporting options you provide the better. Consider options such as:
 - Self – service reports on the intranet or via Web portal
 - Automated reports (daily, monthly and quarterly reports, exception and "watch list" reports, etc.)
 - Online search capabilities with easy to use menus