



Successful Technology Projects

This document provides an overview of the stages in a successful technology project. The Performance Operations Project Approach defined here addresses and resolves the issues presented in the paper “Why Projects Fail”.

The Performance Operations Approach

The Performance Operations approach is different than most consultants and technology integrator teams. Consider the following:

- More consideration of the “the human element”
- An initial focus on the nature of the client organization itself
- More emphasis on “fit to operations”
- A focus on improving the organization and members thereof while simultaneously generating the immediate business results
- Formal yet flexible technology implementation methods
- Professional project management

In short, Performance Operations teams consider the people involved in the project (including the users), the nature of the organization, the operation itself and then the technology. This is in contrast to focusing first and foremost on the technology.

To say that much has been written about implementation methodologies, system lifecycles and so forth would be a huge understatement. What we have found is that people aren't interested in the details of the methodology, they are interested in results. And more specifically results which actually last after the implementation team has moved on. Therefore we have prepared the following summary which applies to any project where technology is applied to an operation.

Performance Operations, LLC

“Creating Lasting Results”

This document, in its entirety, represents the intellectual property of Performance Operations and shall not be reproduced beyond printing from the Performance Operations website for a single reader without prior written consent. All rights are reserved.

www.performanceoperations.com

26861 Trabuco Road #E356 Mission Viejo, CA 92691 (949) 472-9524



Stage 1 - Planning and Technology Selection

This stage is where both the strategic and tactical planning takes place. We start by developing an understanding of the client organization beyond the focus of the target project. This is because we have found that the nature of the solution needs to be in synch with the nature of the business. For example, attempting to force an inflexible but operationally efficient system into a very client centered business will likely fail.

We then move through various stages of definition of the project into a focus on how the technology will fit the operations and how the project implementation will be controlled. The result is a comprehensive project plan which defines all aspects of the project, not just the technology.

The deliverables of this stage are:

1. An documented and understood description of the fundamental nature (personality) of the business
2. A simple statement of the strategic need for the project (how the application of the technology will improve the business in very specific, tangible areas)
3. A high level project plan which describes the tactical steps which will be undertaken to guide the implementation of the project
4. A detailed set of requirements (what the system needs to do) for the technology solution
5. A detailed operations plan which describes how the technology will fit into the operations, what operations will be changed and how they will behave when the system is fully functional (storyboards are typically part of this step)
6. A detailed definition of the project's goals and description of how the project's success will be defined
7. A preliminary technology products and/or services vendor selection is made (at least for the major or critical components)
8. A comprehensive solutions design which defines what technology products will be procured (hardware and software), what services will be provided by whom (technology suppliers, consultants and specific groups on the user's team), what the impact to the user operation will be and a project schedule
9. The expected ROI is developed and documented, including how it will be measured

Performance Operations, LLC

“Creating Lasting Results”

This document, in its entirety, represents the intellectual property of Performance Operations and shall not be reproduced beyond printing from the Performance Operations website for a single reader without prior written consent. All rights are reserved.

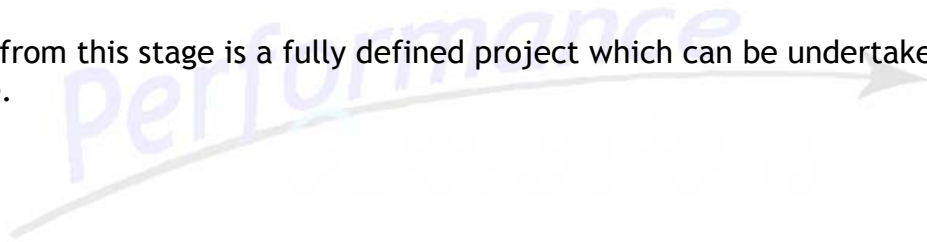
www.performanceoperations.com

26861 Trabuco Road #E356 Mission Viejo, CA 92691 (949) 472-9524



Typically this stage is undertaken with a team which is a subset of the ultimate implementation team. The Stage 1 team typically includes key management personnel who are going to make the decision about whether and how to proceed with the project, as well as at least one representative from each operations department affected by the project.

The result from this stage is a fully defined project which can be undertaken with confidence.



Stage 2 - Systems Implementation

This stage starts with the selection of the vendors and concludes with the handoff of an operating system to the end user team. During this phase, the Performance Operations team controls the project implementation with a well proven methodology and project management skills.

The activities during this stage are:

1. Team Definition - The complete project team is identified, a human communications program is put in place, the professional goals consistent with the project for the individuals on the team are identified and a team mission is developed.
2. Methodology and Project Principles - The specific methodology to be used for the project is defined in detail. Where the methodology is intentionally left “loose”, project principles pick up. Project principles are actually more effective in many instances than formal methodology verbiage because a principle can easily be applied to more situations than can be documented in a methodology. An example of a simple but very effective project principle is that the technologist who programs code or configures a system cannot be the same individual to perform the final software testing.
3. Solutions Design Review - The complete team reviews the Solutions Design prepared in Stage 1 and is challenged. Updates and improvements are made as required. Changes to the design which will affect project cost are challenged and the ROI is updated as needed.
4. Product and Service Selection - Product and service suppliers are re-considered and any necessary changes are made. Suppliers of the more detailed system components and minor services are selected at this time.
5. Detailed Solution Plan - The Solution Plan is updated and made more detailed. Project Phases are fully defined at this point and will be used to control the project.
6. Project Schedule - The project schedule is updated based on the suppliers and any changes to the Solution Plan.
7. Contract Development and Vendor Negotiations - Performance to each project phase will be defined and made part of vendor contracts. Final negotiations are conducted with the primary vendors.

8. Detailed Operations Documentation - Storyboards and sequence of operations documents are developed in coordination with systems development. This is to ensure that all technology systems will in fact operate in synchronization with the desired operational procedures. This is more complex but much more effective than simply adapting the user procedures to the technology.
9. Technology Demonstration - A development system will be made operational with all key aspects of the technology demonstrated as the first project milestone.
10. Milestone Reviews - All successful project implementations are broken down into periodic milestones. Ideally every 2nd or 3rd milestone is actually an installation so that both users and the implementation team members get feedback that their efforts are going in the right direction, to show client management that everything is really on track and to start generating payback as soon as possible. Vendors will be measured against milestones during this period.
11. Functional Testing - Applied technology is tested in various ways during project implementation. Software needs to be tested at the level of the programmer, by a peer programmer and then again by a user, all before final installation and proving.
12. Project Management - Project management activities are performed throughout this project stage, with updates to schedules, reviews of vendor progress, etc., taking place as required.
13. Handoff to the client team - The final activity of this phase is for all technology suppliers to back away from the operation and regular maintenance of the system. This means that all documentation necessary for the regular maintenance of the system is in place at this time. The ideal situation is where the client team is capable of going beyond maintenance to include enhancement and optimization of the system.

The result from this stage is a project which is complete in terms of operation. All aspects which will contribute to the ROI are in place and now final optimization can be completed.



Stage 3 - Optimization

The final stage of any technology project is to continue to optimize the way the applied technology works with client operations. Ironically those “problem projects” which encountered lots of troubles during implementation need this phase the most but seldom get the attention. This is probably because of budget overruns. The problem is that many times technology systems stay in place which are in some ways inferior to previous systems, reducing the ROI and contribution of the system to the core nature of the organization.

The goals of this stage are to:

1. Discover and take away the inevitable “work arounds” which pop-up during the project implementation.
2. Smooth out the rough edges in operations by re-examining all sequence of operations and streamlining them.
3. Discover the operational areas which were either not addressed or for which “shortcuts” were taken which are not efficient. Improve flexibility where necessary.
4. Correct any functional issues with the system which users have been uncomfortable talking about or which have only become evident after the system has been in operation for some time.
5. Work out all issues with user training, getting backup users up to speed, changes which need to be made on the user team and other aspects of the user team which are effecting the performance of the system.
6. Ensure all members of the client team are comfortable with the operation and maintenance of the system and have all necessary methods in place to keep the system operating and for planning of future enhancements.

The results of this phase are a system which is optimized to the point where more optimization work will not provide a payback.

This is only a top level summary of the approach taken by the Performance Operations team. Each project has its specific requirements and will differ from this template. The bottom line is that by addressing the human aspects of the project along with the operations and the technology, the Performance Operations approach is significantly more effective than that provided by other consultants, project managers and systems integrators.

Performance Operations, LLC

“Creating Lasting Results”

This document, in its entirety, represents the intellectual property of Performance Operations and shall not be reproduced beyond printing from the Performance Operations website for a single reader without prior written consent. All rights are reserved.

www.performanceoperations.com

26861 Trabuco Road #E356 Mission Viejo, CA 92691 (949) 472-9524