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Rollout Plan

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Price & Project Self Diagnosis

We have found that there are several types of customer with very different needs.

Please answer the following questions in order to determine your profile.

1. Size: What is the size of your organization (in-house employees):
 - A. 1-5 employees
 - B. 5-50 employees
 - C. > 50 employees

2. „Business“ or „Technology “ Orientation: Where do you focus?
 - A. We are focused on business
 - B. Business focus, but we can deal with technology
 - C. Strong technology skills

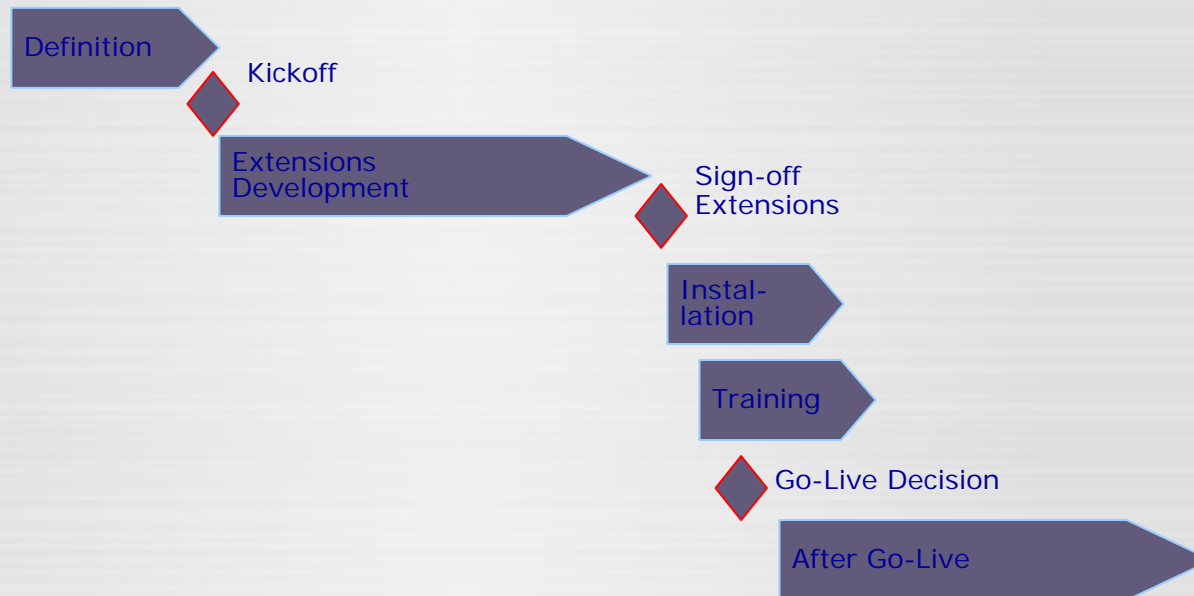
Price & Project Self Diagnosis

- During the implementation of an integrated IT system your organization will have to overcome a number of obstacle:
 - Technological
 - Business Processes
 - Organizational Change
- Organizations with strong technical skills can overcome these barriers by themselves.
- Other organizations will need consulting in order to impelment **]po[** (or any other system) successfully.

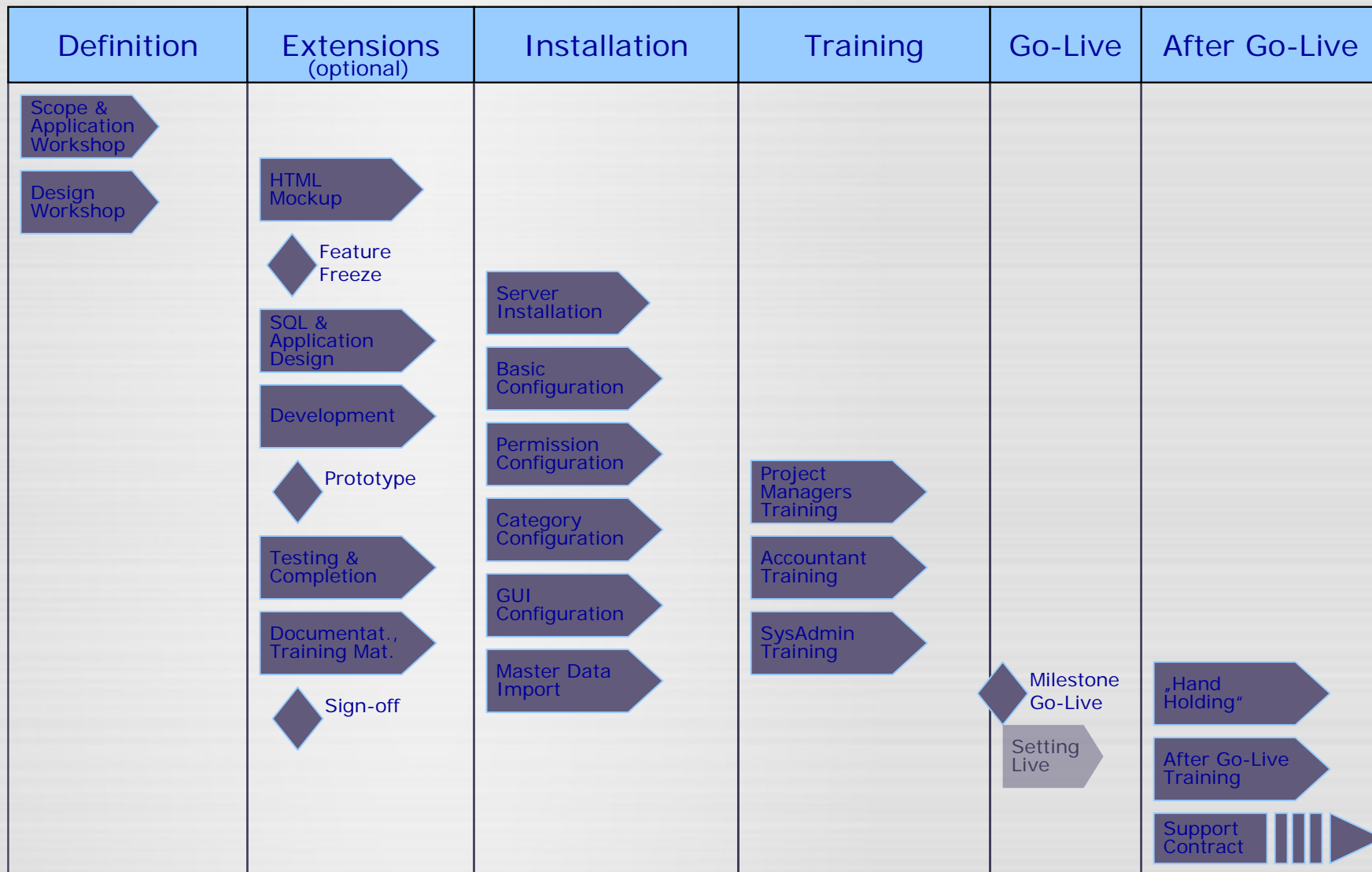
	A. Business focus	B. Some technology	C. Strong technology
C >50 employees	€ 15k-200k Intensive Consulting	€ 10k – 50k Train the Trainer	€ 0 – 50k Partnership & in-house development
B 5-50 employees	€ 5k-50k Intensive Consulting	€ 5k- 25k Train the Trainer	€ 0 - 10k DIY, in-house development
A 1-5 employees	Hire SysAdmin	€ 1k-3k Train the Trainer	€ 0 DIY No help needed.

Technology Sophistication

Macro Planning



]po[Implementation Phases



Definition Phase

Work Package	Objective	Deliverables
<p>Scope & Application Workshop</p>	<ul style="list-style-type: none"> Customer's Senior Management learns about the application and identifies the]po[modules to be implemented. Identification of extension development necessities. 	<ul style="list-style-type: none"> Scope of project Input for first cost estimate Decision structure
<p>Design Workshop</p>	<ul style="list-style-type: none"> Senior Management or Key Users specify configuration and customization necessities. Scoping and functional requirement definition for extension development. 	<ul style="list-style-type: none"> Configuration requirements Extension requirements Input for detailed quote

Extensions Phase

Work Package	Objective	Deliverables
<p>HTML Mockup</p> <p>◆ Feature Freeze</p>	<ul style="list-style-type: none"> ▪ Build a functional “mockup” using static HTML pages based on input from the “Design Workshop”. ▪ Mockup confirmation in a functional design workshop and freeze of specifications. 	<ul style="list-style-type: none"> ▪ HTML mockup ▪ Functional specifications
<p>SQL & Application Design</p>	<ul style="list-style-type: none"> ▪ Define how extensions should relate to existing]po[modules. ▪ Design a SQL data model. 	<ul style="list-style-type: none"> ▪ Reutilization Concept ▪ Data Model
<p>Development</p> <p>◆ Prototype</p>	<ul style="list-style-type: none"> ▪ Implement the specified extensions. ▪ Presentation of a prototype to the customer. 	<ul style="list-style-type: none"> ▪ Working code ▪ Confirmation of functionality
<p>Testing & Completion</p>	<ul style="list-style-type: none"> ▪ Completion of the prototype functionality and testing in the customer’s context. 	<ul style="list-style-type: none"> ▪ Working system
<p>Documentat., Training Mat.</p> <p>◆ Sign-off</p>	<ul style="list-style-type: none"> ▪ Documentation of the extensions and development / adaptation of training material. ▪ Extensions sign-off. 	<ul style="list-style-type: none"> ▪ Documentation & training material ▪ Working extensions

Installation Phase

Work Package	Objective	Deliverables
	<ul style="list-style-type: none"> Install the]po[application on a production server and (optionally) on a development/test server. Security configuration. 	<ul style="list-style-type: none"> Installed applications
	<ul style="list-style-type: none"> Configuration of Admin / Parameters section according to customer requirements. 	<ul style="list-style-type: none"> Working application
	<ul style="list-style-type: none"> Setup of user profiles and user profile privileges according. 	<ul style="list-style-type: none"> Secure application
	<ul style="list-style-type: none"> Adapt]po[categories (project types, customer types, ...) to the specific business. 	<ul style="list-style-type: none"> Adapted application
	<ul style="list-style-type: none"> Adapt GUI colors and font styles to the customer's corporate design (optional). 	<ul style="list-style-type: none"> Attractive application
	<ul style="list-style-type: none"> Create]po[customers, providers, customer contacts, freelancers, employees and prices from existing data. 	<ul style="list-style-type: none"> Usable application

Training Phase

Work Package	Objective	Deliverables
Project Managers Training	<ul style="list-style-type: none">▪ Allow PMs to efficiently use the "Translation Workflow", "File Storage" and "Forum" modules.	<ul style="list-style-type: none">▪ Successful training
Accountant Training	<ul style="list-style-type: none">▪ Allow accountants to efficiently use the "Translation Invoices" and "Freelance Invoices" (optional) modules.	<ul style="list-style-type: none">▪ Successful training
SysAdmin Training	<ul style="list-style-type: none">▪ Enable the Sysadmin to perform backup, restore and recovery operations.	<ul style="list-style-type: none">▪ Successful training

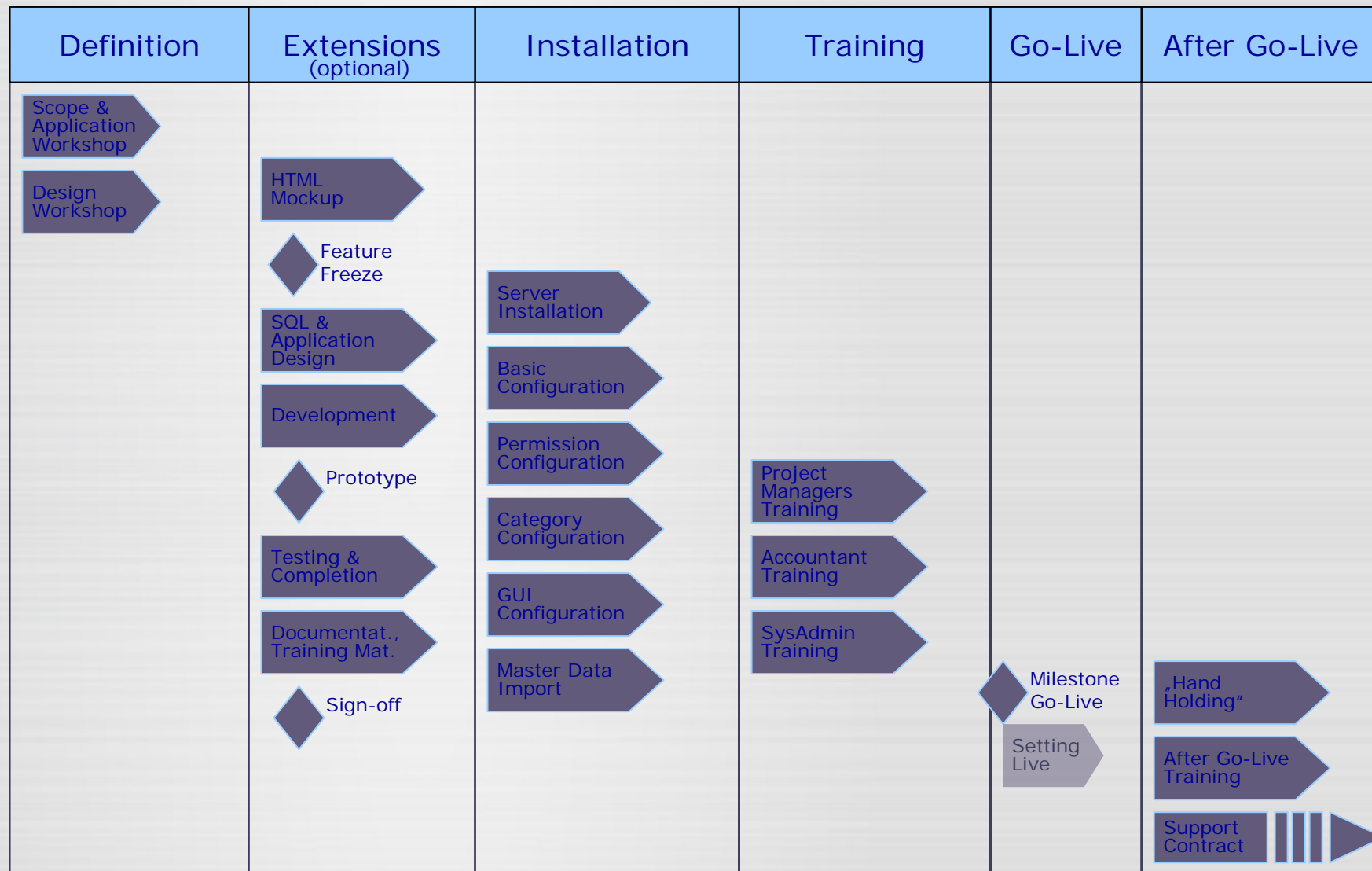
Go-Live Phase

Work Package	Objective	Deliverables
<p data-bbox="167 382 409 458">◆ Milestone Go-Live</p> <p data-bbox="167 525 491 648">Setting Live</p>	<ul data-bbox="525 382 1443 639" style="list-style-type: none">▪ Obtain technical OK to go-Live.▪ Obtain user's OK to go-live. ▪ Live setting of the application. Final transfer of data from the legacy to the new system (optional).	<ul data-bbox="1527 382 1791 596" style="list-style-type: none">▪ Decision to go-live ▪ Operational new system

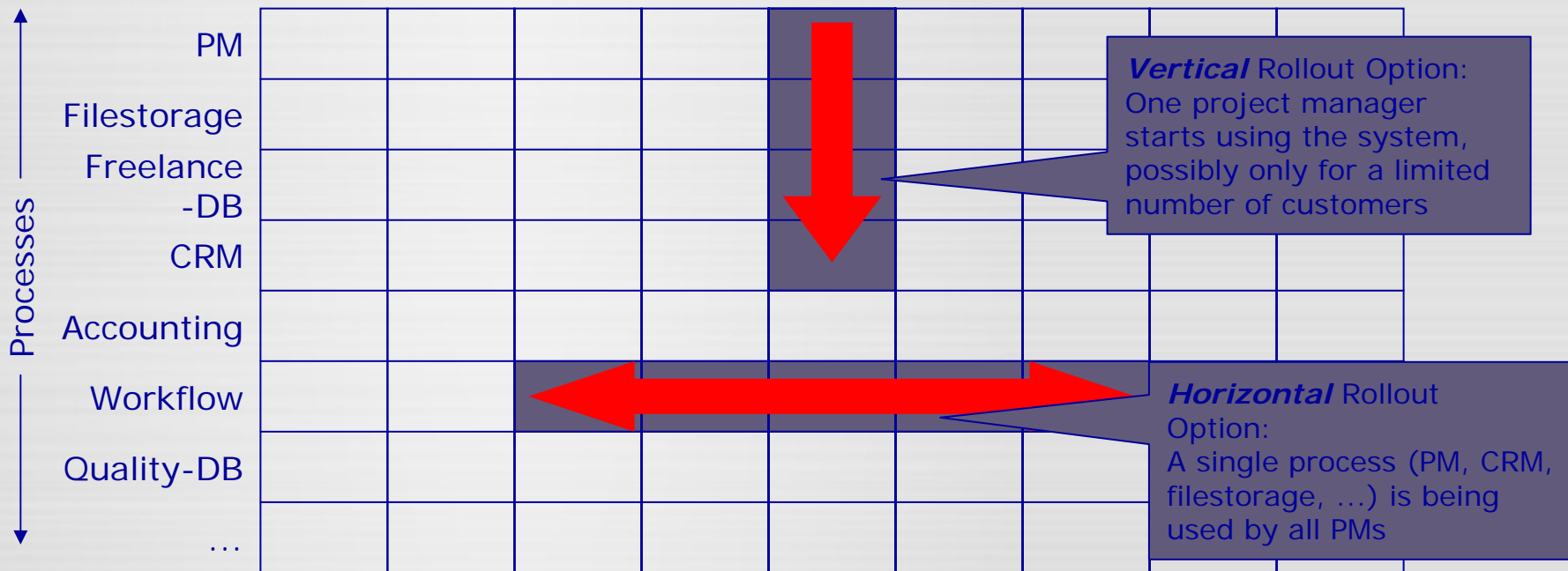
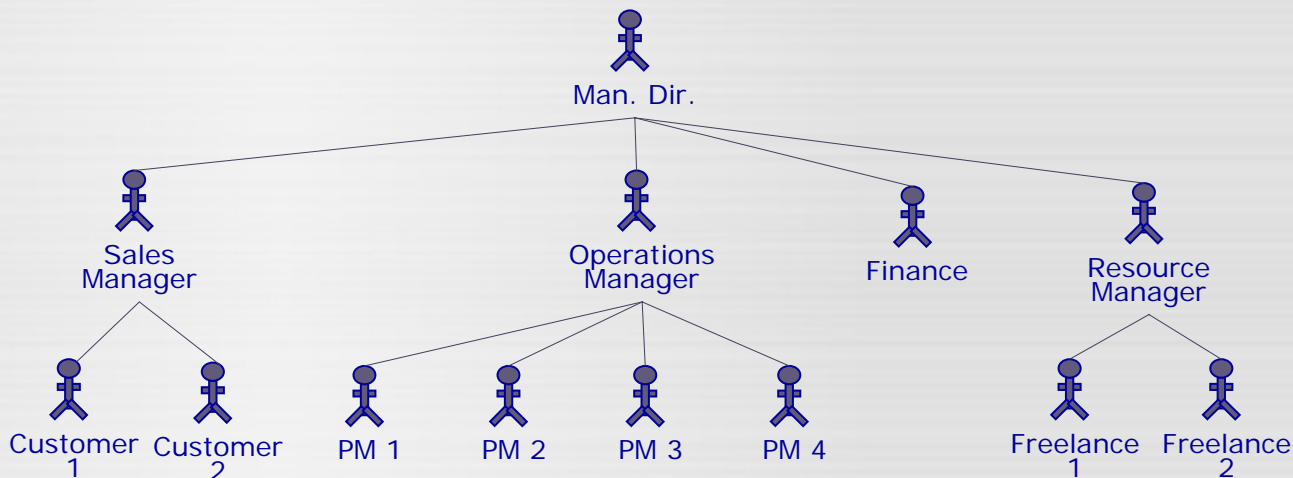
After Go-Live

Work Package	Objective	Deliverables
"Hand Holding"	<ul style="list-style-type: none">▪ Presence of implementation team members during the first days after going live in order to deal with questions and issues.	<ul style="list-style-type: none">▪ Successful completion of the first project cycles
After Go-Live Training	<ul style="list-style-type: none">▪ Training to deal with unanticipated or unresolved questions after the go-live.	<ul style="list-style-type: none">▪ All users are capable of using the system
Support Contract	<ul style="list-style-type: none">▪ Ongoing support.	<ul style="list-style-type: none">▪ A stable and updated system

]po[Implementation Phases



]po[Rollout Options



„Vertical“ Rollout

Pros

- Limited Risk: A single project manager „tests“ the functionality
- Skill Management: The initial PM will probably be interested in systems & IT
- The initial PM can later provide training & support to the other PMs

Cons

- Integration Difficulties: This approach can be difficult if]po[needs to be integrated with existing systems.

Summary

- „Vertical“ is the best option for smaller companies and companies without PM systems.

„Horizontal“ Rollout

Pros

- Reduces Integration Difficulties: „Big Bang“ rollout is cheaper if there are existing systems that would have to run in parallel otherwise.
- No duplicated training

Cons

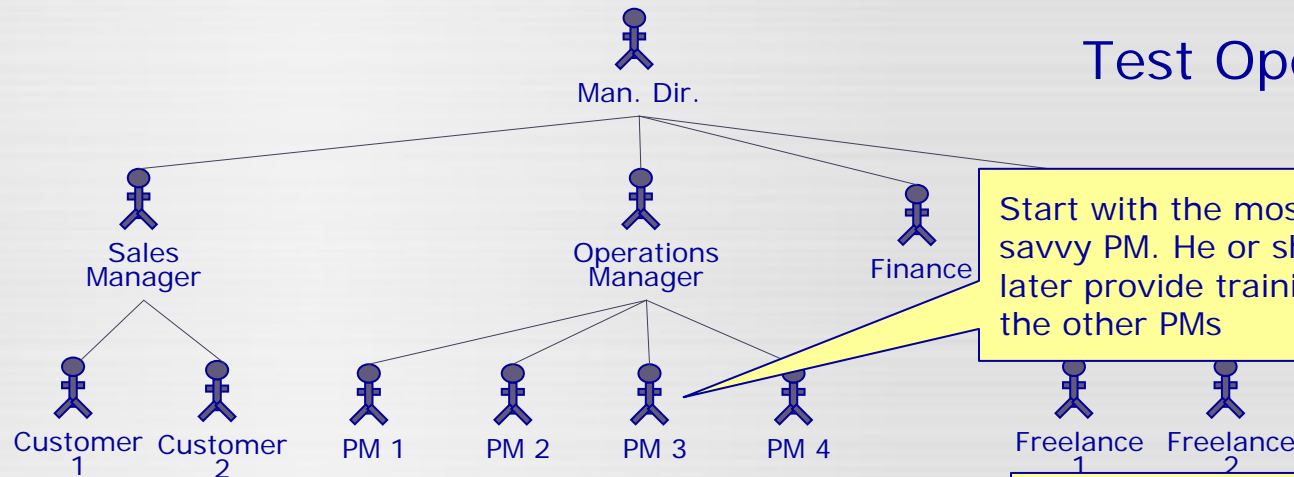
- Higher Risk: Initial implementation difficulties have bigger impact on the company

Summary

- „Horizontal“ is the best option for complex rollouts in larger companies in order to avoid high integration costs with existing systems.
- „Horizontal“ may be combined with a „vertical“ test phase.

Typical Rollout (1)

Test Operations



Start with the most IT-savvy PM. He or she will later provide training to the other PMs

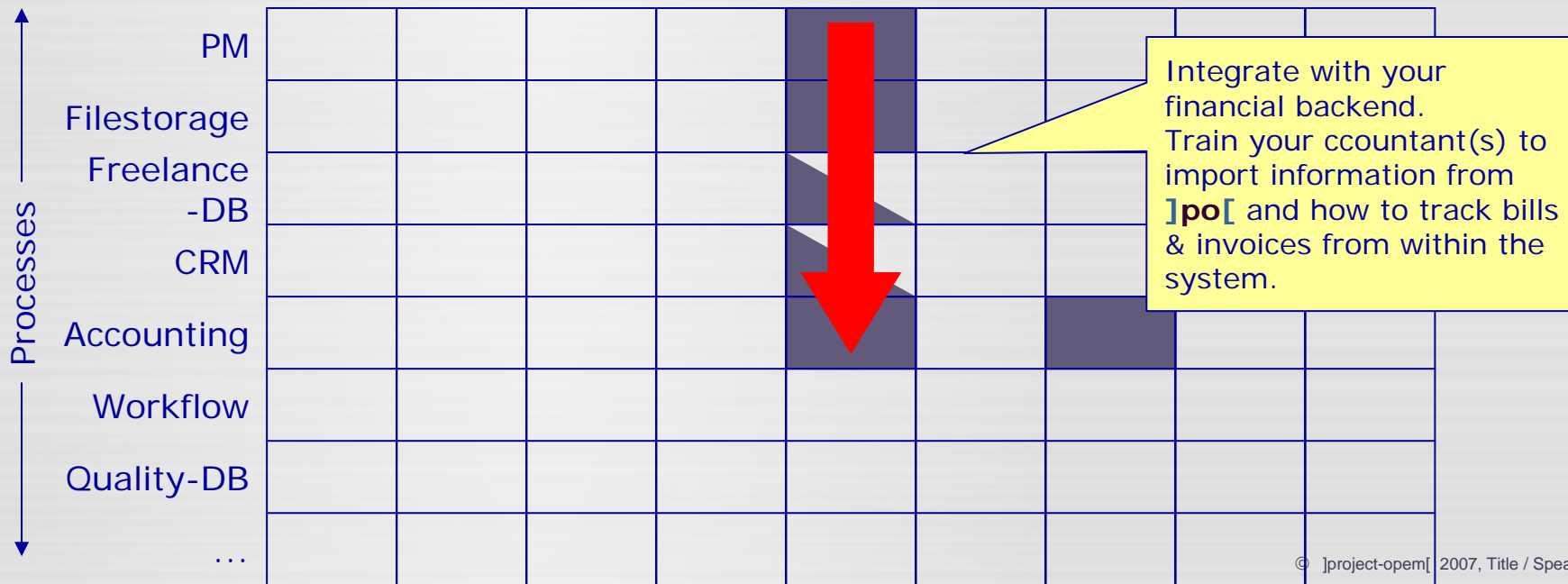
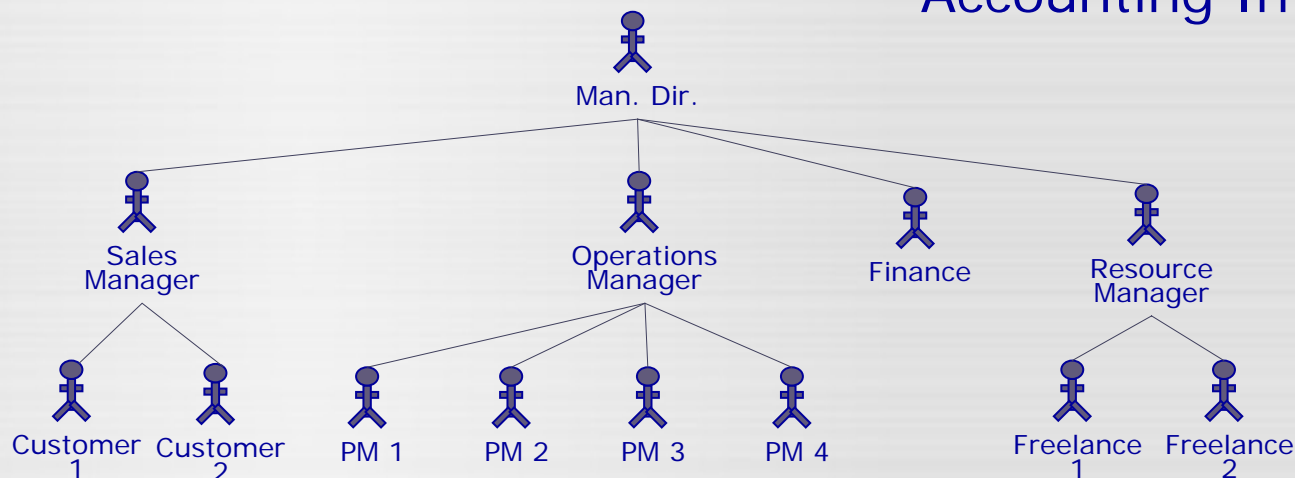
Processes

PM									
Filestorage									
Freelance-DB									
CRM									
Accounting									
Workflow									
Quality-DB									
...									

Start with project management and the freelance-DB. You will need to setup a few customers and freelancers in order to get started.

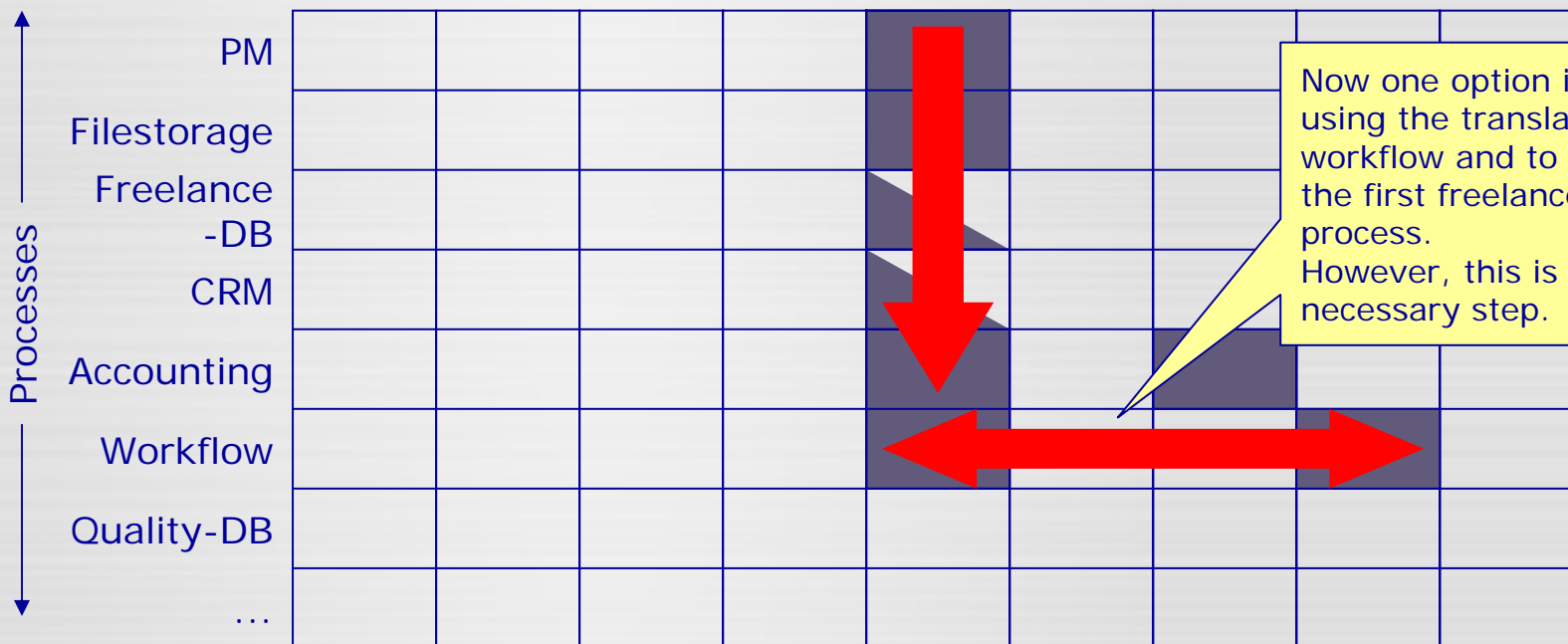
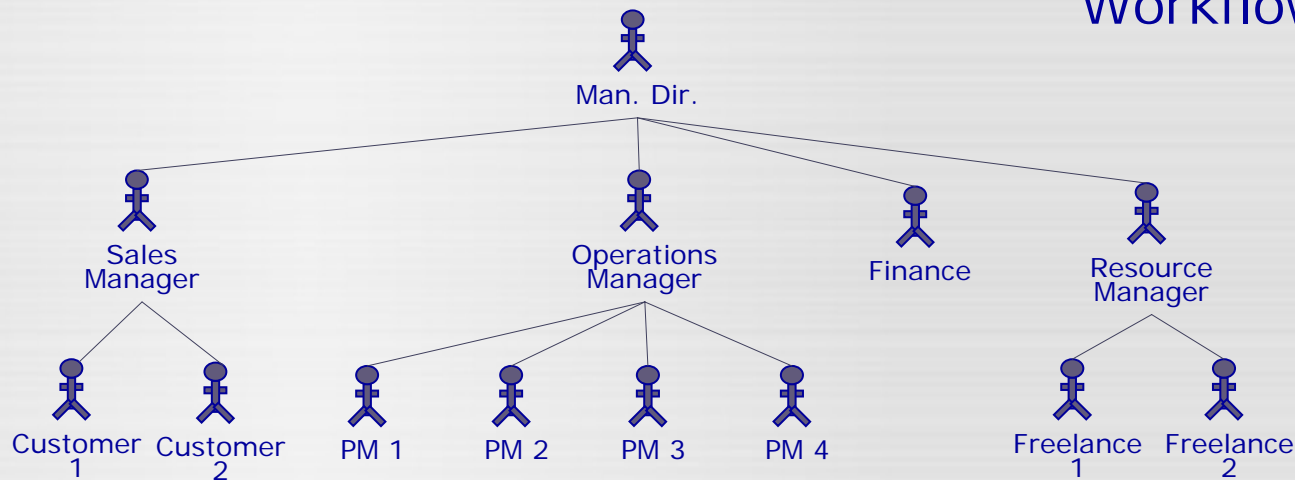
Typical Rollout (2)

Accounting Integration



Typical Rollout (3)

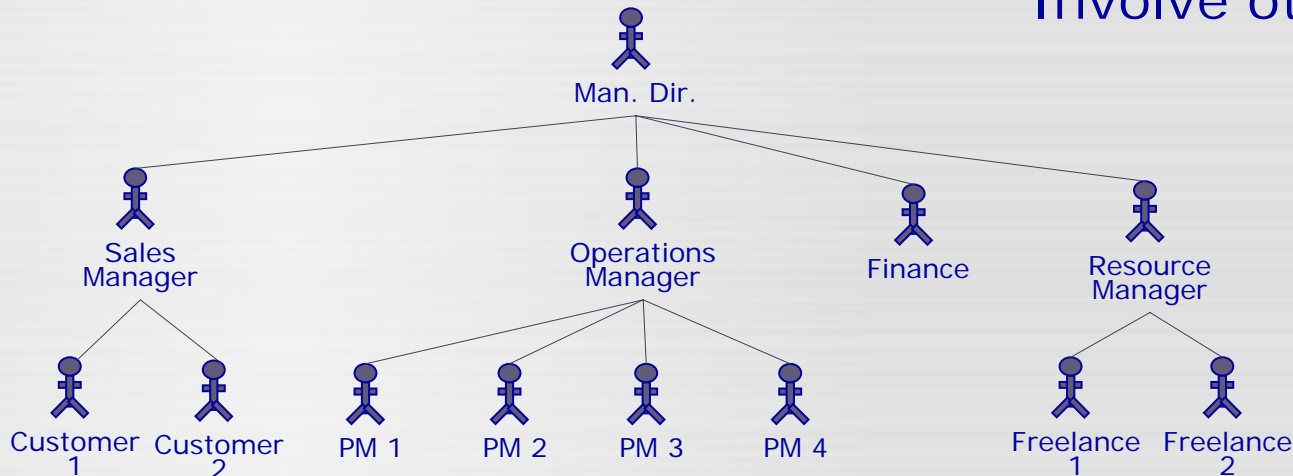
Workflow Rollout



Now one option is to start using the translation workflow and to involve the first freelancers in the process. However, this is not a necessary step.

Typical Rollout (4)

Involve other PMs



Processes

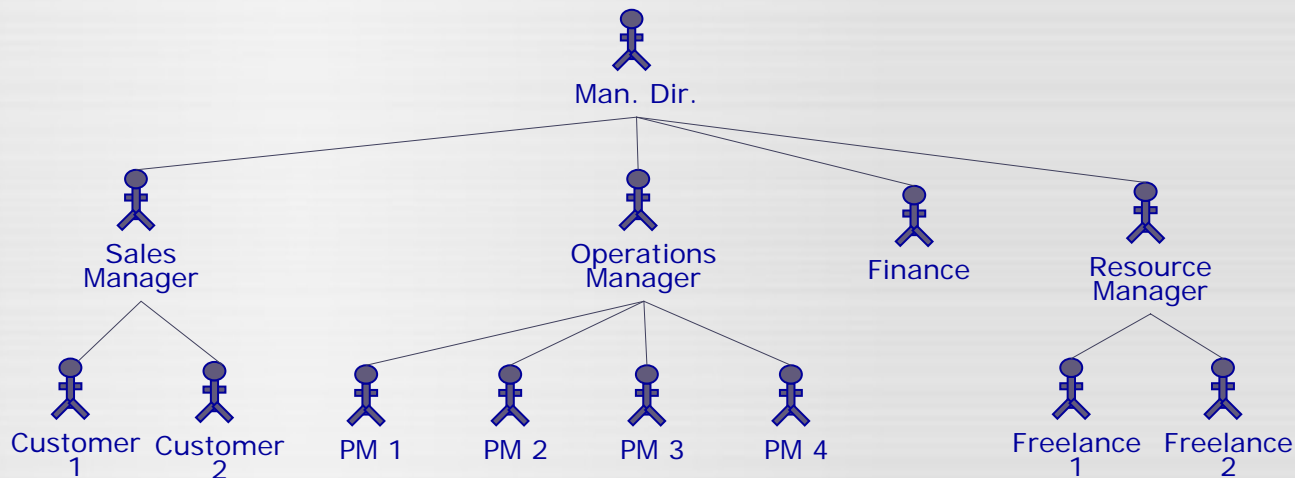
PM								
Filestorage								
Freelance								
-DB								
CRM								
Accounting								
Workflow								
Quality-DB								
...								



Now (some 1-3 month after starting with the first PM) your company is typically ready to rollout]po[for the other PMs.

Typical Rollout (5)

Further Options



Processes

PM								
Filestorage								
Freelance-DB								
CRM								
Accounting								
Workflow								
Quality-DB								
...								

After this point there are several options on how to proceed. However, your company will have made a lot of progress understanding the system, allowing you to take an informed decision.

End

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