



Upgrade Success Criteria

The Seven Ingredients that make or break a PeopleSoft Upgrade

Recipe for Success: Seven Ingredients that Make or Break a PeopleSoft Upgrade.

It's a question that will make a room fall silent: what's the difference between a successful upgrade and one that fails?

We have seen two completely opposite ends of the spectrum between effective PeopleSoft projects and ones that have not succeeded. Historically, we've been asked to come in to try to remedy a number of unsuccessful upgrades. It's almost always ugly, and it happens more than you might think. The upside? As a result of the cleanup work, we have been able to assemble a list of seven best practices that can ensure an upgrade is steered in the proper direction.

Here's what we've learned, in no particular order:

- 1. Tie your solution to your business objectives.** We've said it a hundred times: a project can be on time and on budget, but if it does not meet the objectives of the project or business, then it will not be successful. Outline your objectives right from the start, and begin implementing your strategy right away. Companies use PeopleSoft for specific reasons, and after spending several months and countless dollars, everything will be a failure if you don't meet your objectives. This probably seems obvious, but it's incredible how often this gets brushed aside during a project in favor of more tactical objectives.

At MIPRO, one of the first activities we conduct during an upgrade is the Blueprint Workshop. The workshop identifies, classifies and prioritizes all of the project objectives, and outlines how we are able to measure each goal (after all, if you can't measure it, it is challenging to determine if it was met). Finally, we attach project success criteria to the objectives. These objectives are a part of the project charter, which should be approved by the executive sponsor.

- 2. Manage your scope.** Scope creep is the number one killer of a project. It can kill a project with one large change or many, many small changes (what we call 'death by duck bites'). By properly defining your scope beforehand, you can help prevent this issue from ever arising.

To ensure success, every project should possess a well-defined scope change management plan with appropriate escalations and approvals. Preferably, any modification to scope once the fit/gap analysis is completed requires a change order—no matter if it is a slight alteration or a very large change. All changes must be permitted by project management and executive sponsorship to be fully approved.

- 3. Be prepared for change.** Upgrading software without a hitch is key for a successful engagement; but beyond that, it is important that the organization is ready to use the software and prepared for the business changes that it will bring. Without being prepared for change, there is a high probability that user adoption of the new software will be negatively impacted and the software will be blamed. In effect, it is not just the software, but rather the logistics of being ready to use it, support it and adopt new business processes that can lead to a successful upgrade.

It is incredibly helpful to assign a full-time organizational change management employee that has experience with preparing organizations for change associated with PeopleSoft engagements to the project. Organizational change preparedness is so much more than simply communication; it requires its own discipline, expertise and dedicated skillsets.

- 4. Have an experienced and knowledgeable team.** During the sales cycle when we discuss what is key to success, we are promised only the best and brightest dedicated to the project. Unfortunately, business priorities often intervene and the project ends up being staffed with inexperienced colleagues who are unprepared to take on such responsibility. Since new software will help establish best practices, having an experienced team that understands the details of the business is very important.

For example, we identify the resources required from both the client and MIPRO during our Blueprint Workshop. For each client resource, we pinpoint specific roles, responsibilities and time commitments that are required for the project. This information becomes part of the project charter. As outlined in the charter, these are the resources required to ensure that the project is completed on time and on budget. We conduct a sanity check of resources against project objectives, and we expect the executive sponsor to support the project and ensure the identified resources are available for the anticipated timeframe.

- 5. Have a visible and prominent executive sponsorship.** Overlooking the role of the executive sponsor is a problem that arises all too often. Executive sponsors will be key in managing scope and change requests, while ensuring the project has the correct resources and resolving issues. I have seen many projects with all of the right elements except a strong executive sponsor fail because of this one problem.

During our upgrades, the role of the executive sponsor begins immediately with the Blueprint Workshop. This is where the executive sponsor outlines why the project is important to the organization and identifies corporate level objectives that we then tie to the project objectives. The sponsor then signs off on the project charter along with his or her expected role. We put the executive sponsor into the change process, issue escalation process and organizational change process.

- 6. Ensure the customer can sustain their system.** The client must be able to support and grow the solution while possessing the knowledge of how to do so. There are cost-cutting upgrade methods out there such as lab, offshore etc., which can upgrade for a lower cost. However, with reduced costs come additional risks. The highest price paid is the fact that insufficient knowledge transfer has occurred and the client is unable to sustain and support the solution once it is live and the upgrade partner has departed. Proper education of the system to internal employees is imperative for a successful upgrade.

At MIPRO, knowledge transfer is the cornerstone of our MPower upgrade methodology. Not only do we staff the best and brightest, but we also align resources directly to the appropriate client counterparts. Our design is set up to allow the MIPRO team to understand the client business and for the client to understand PeopleSoft. By the end of the project, we expect our clients to know as much about PeopleSoft as we do. This way, once we're gone, they can sustain the system themselves. Additionally, we ensure shortcuts are not taken on testing and training. This happens through appropriate planning and execution from the get-go.

- 7. Train and educate end users.** Often, as pressures mount to hit the expected go-live date with out increasing costs, corners are inevitably cut. Generally, those corners are cut in testing or training — both of which are major mistakes. End users must be trained in order to effectively use the solution. A proper and efficient training program should be developed and executed close to the go-live date to ensure end users are ready for the upcoming changes. By executing this training, you will have a cleaner go-live, while avoiding help desk issues and the problem of poor user adoption.

There are multiple steps in the process of making sure your end users are trained on the new software. The first is a training strategy developed early in the project. We also recommend hiring or assigning a training lead to develop and monitor these training efforts. The Oracle User Productivity Kit is a very valuable tool to help ensure end users are trained, and we can coordinate the timing of end user training to coincide as close to your go-live date as possible. With proper planning, we can avoid situations where the timeline is crunched and the project is forced to find ways to cut corners. Having proper staffing, planning and dedication to training allows us to ensure end users are prepared for the upgrade.

This is far from an all-encompassing list of requirements to ensure a positive upgrade, but, by following these seven steps, you will be moving in the right direction. At the end of the day, these seven lessons are not about software, but about sound project management practices and project preparedness. In very few circumstances is the software actually the problem. In most cases, everything that is required to implement or upgrade the software is the culprit. While many complications and challenges will arise, defining your scope and objectives beforehand, while providing continuous training and education throughout, can relieve much of the stress and problems created by poor planning.