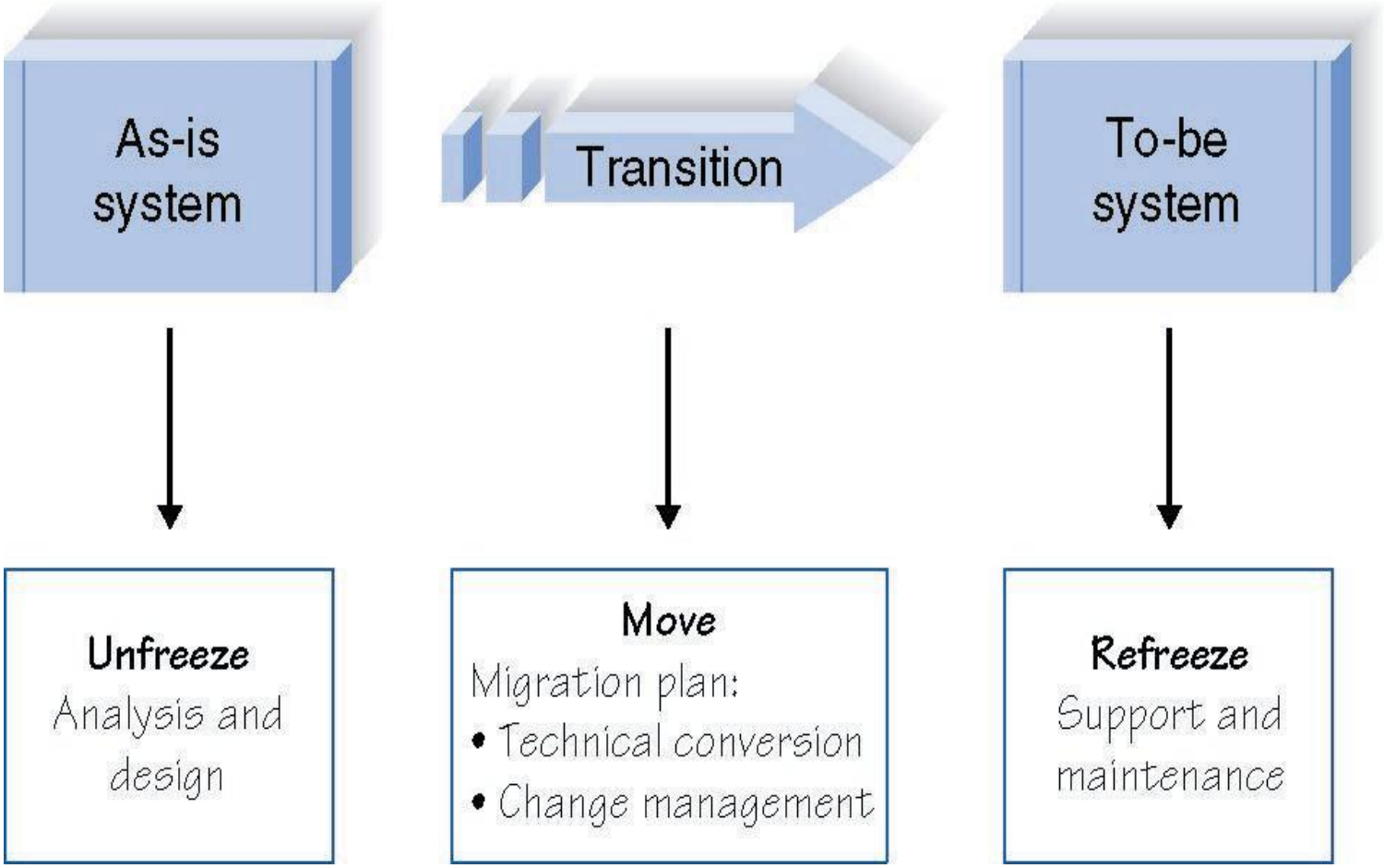
Installation

introduction

- Transitioning to new systems involves managing change from pre-existing norms and habits.
- Change management involves:
  - Unfreezing -- loosening up peoples' habits and norms
  - Moving -- transition from old to new systems
  - Refreezing -- institutionalize and make efficient the new way of doing things

Implementing Change



introduction

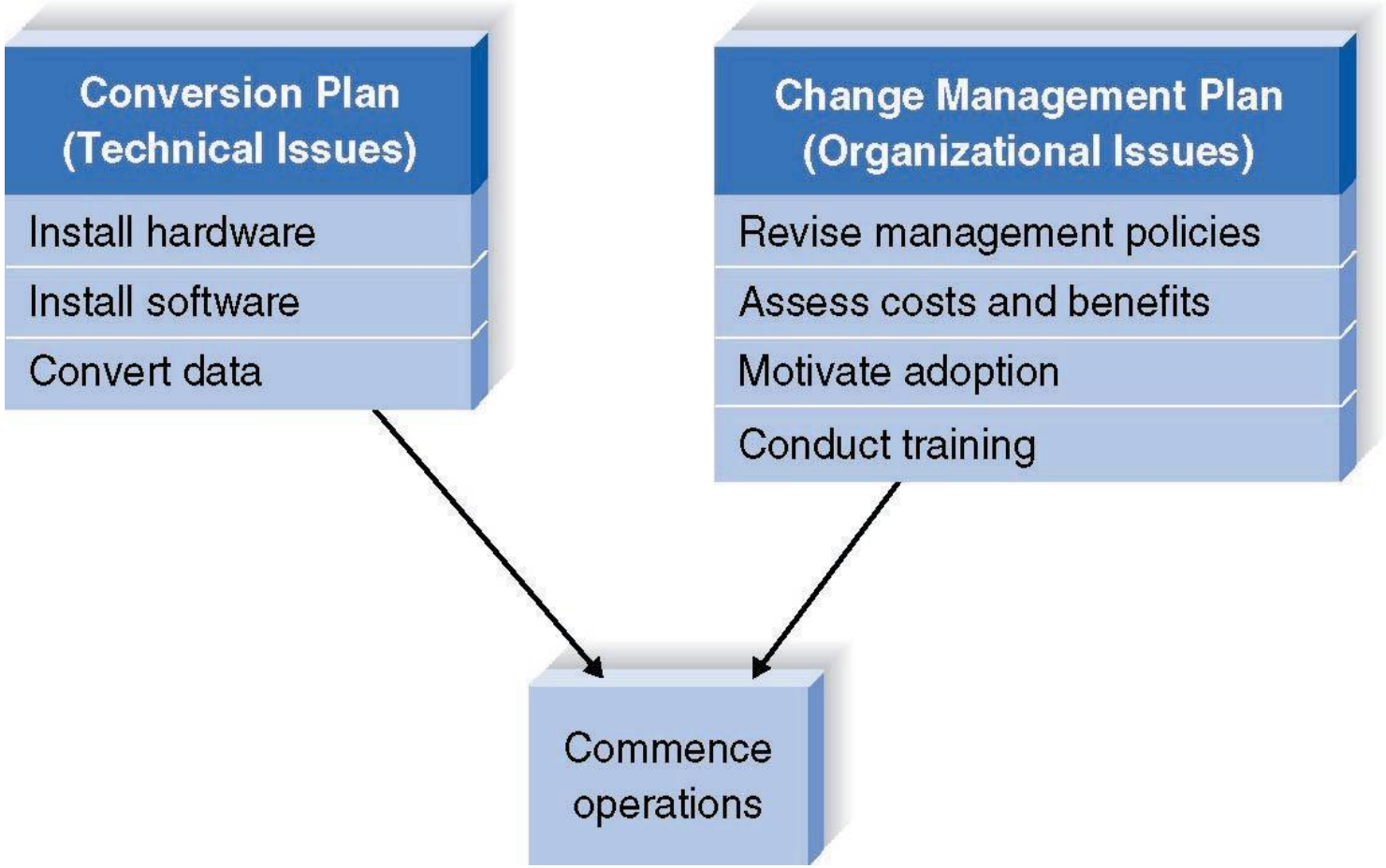
- Post-implementation activities include providing:
  - System support, such as help desks
  - Systems maintenance, fixing bugs and providing improvements
  - Project assessment, learning how to improve from project experiences

CONVERSION

Migration Planning

- What activities will be performed when and by whom
  - Technical aspects
    - Installing hardware and software
    - Converting data
  - Organizational aspects
    - Training users on the system
    - Motivating employees to use the new system to aid in their work

Elements of a Migration Plan



Conversion Styles

- Direct conversion
  - The new system instantly replaces the old
- Parallel conversion
  - For a time both old and new systems are used. The old is abandoned when the new is proven fully capable

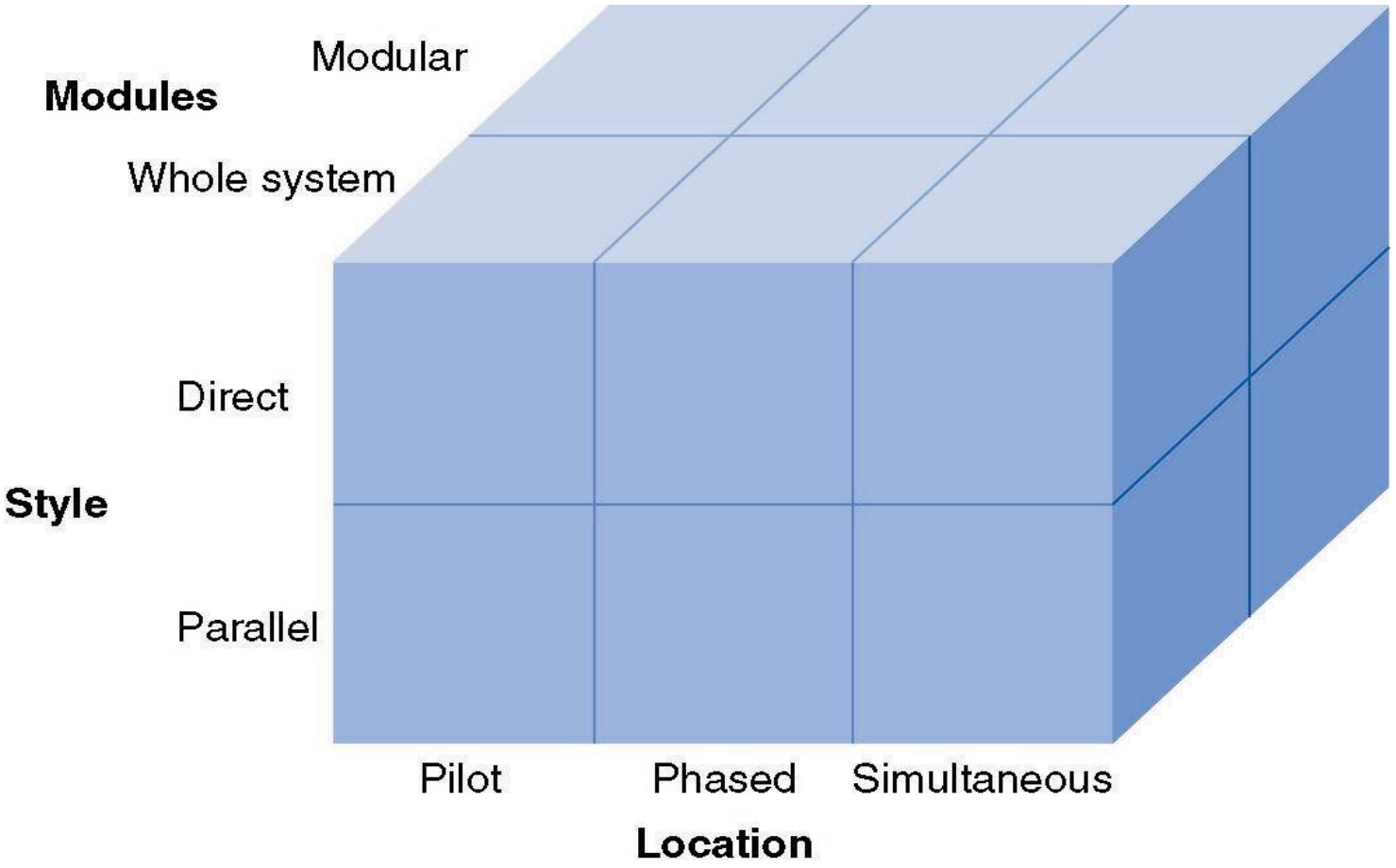
Conversion Styles

- Pilot conversion
  - One or more locations are converted to work out bugs before extending to other locations
- Phased conversion
  - Locations are converted in sets
- Simultaneous conversion
  - All locations are converted at the same time

Conversion Modules

- Whole system conversion
  - All modules converted in one step
- Modular conversion
  - When modules are loosely associated, they can be converted one at a time

Conversion Strategies



Key Factors in Selecting a Conversion Strategy

- Risk
  - Seriousness of consequences of remaining bugs
- Cost
  - Parallel requires paying for two systems for a period of time
  - Simultaneous requires more staff to support all locations
- Time
  - Parallel, phased, and modular require more time

CHANGE MANAGEMENT

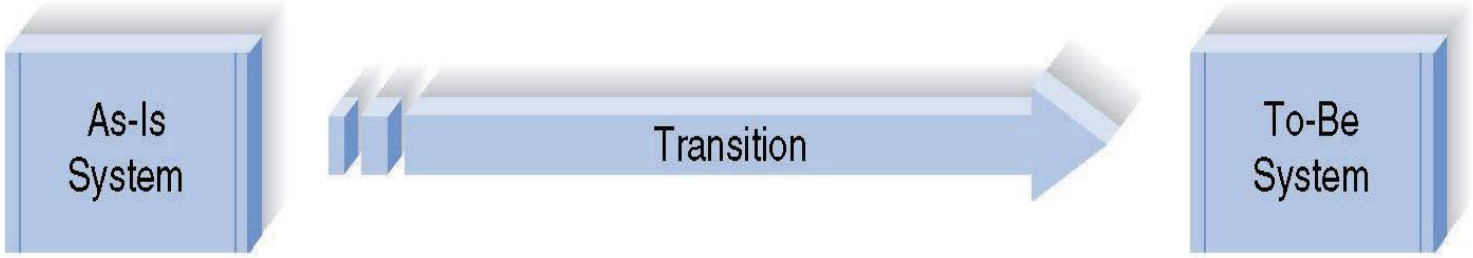
Key Roles in Change Management

- The sponsor is the business person who initiated the request for the new system
- The change agent is the person(s) who lead the change effort
- The potential adopter(s) are the people who must change.

Understanding Resistance to Change

- What is good for the organization, is not necessarily good for the individuals who work there
- Cost versus benefit of transition as well as of to-be system
- Adapting to new work processes requires effort, for which there may be no additional compensation

Costs and Benefits of Change



Restraining Factors	Enabling Factors
Costs of *Transition* X Certainty of Costs Occurring	Benefits of *Transition* X Certainty of Benefits Occurring

Restraining Factors	Enabling Factors
Costs of *To-Be System* X Certainty of Costs Occurring	Benefits of *To-Be System* X Certainty of Benefits Occurring

Revising Management Policies

- No computer system will be successfully adopted unless management policies support its adoption
- Management tools for supporting adoption
  - Standard operating procedures (SOPs)
  - Measurements and rewards
  - Resource allocation

Assessing Costs and Benefits

Factors in Successful Change	
Benefits of to-be system Certainty of benefits Costs of transition Certainty of costs	***What Actions Will Encourage the Fullest Measure of Each Factor?***

Motivating Adoption

- The information strategy aims to convince adopters that change is better
- The political strategy uses organizational power to motivate change
- Differentiate between ready adopters, reluctant adopters, and resistant adopters

Training

- Every new system requires new skills
- New skills may involve use of the technology itself
- New skills may be needed to handle the changed business processes

What to Train

- Should focus on helping users accomplish their tasks
- Use cases provide an outline for common activities and a basis to plan training

Types of Training

Types of Training	
One-to-One Classroom Computer-Based	***When Would You Use Each of These Training Methods?***

POST-IMPLEMENTATION ACTIVITIES

Institutionalization of the System

- Provide support
  - Assistance in using the system
- Provide maintenance
  - Repair or fix discovered bugs or errors
  - Add minor enhancements to provide added value
- Assess the project
  - Analyze what was done well
  - Discover what activities need improvement in the future

Types of System Support

- On-demand training at time of user need
- Online support
  - Frequently asked questions (FAQ)
- Help desk
  - Phone service for known issues
  - Level 2 Support

Sources of Change Requests

1. Problem reports from the operations group
2. Requests for enhancements from users
3. Requests from other systems development projects
4. Change requests from senior management

System Review

- Examine the extent to which the costs and benefits of the system are realized
- Use this information to help in more accurately estimating costs and benefits for future projects