Deployment Strategy Planning

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For a successful deployment of anything from a brand new reporting environment to a minor change to an existing dashboard, there is a lot to consider to maximize the likelihood of user adoption/satisfaction.

The below bullets are a good starting point for general considerations to keep in mind when doing any significant deployment of new functionality, but it's not a comprehensive list and there will always be circumstances unique to each situation.

Doing a slow, phased rollout to users can help mitigate most of the risks and help identify unforeseen issues with the solution and/or deployment strategy.

- Documentation:
  - Technical architecture (diagram showing sources, data flow, logic)
  - Admin credentials for all components in use
  - Process for making common changes
  - Troubleshooting processes
  - Any manual processes that are required, and the process to follow when executing them
  - Migration process
  - Checklist to follow when making any significant changes
  - Is the security model documented?
    - Need to ensure that future changes don't potentially break security, and that security rules are clearly understood in case they need to be modified in the future
- Support model
  - What happens if some component of the solution is down unexpectedly? Is there an automatic notification that will get sent to the admin in case of failure (or success if you prefer)?
  - How do users notify someone in case of an outage?
  - How do users notify someone with an issue or request?
    - User finds the system is down or not working as expected
    - User forgets log in credentials
    - User forgets how to use some component of the system
    - User finds data inaccuracies
    - User wants new functionality added
    - New user wants access to the system
  - How do the users know who to contact (short term and long term)?
  - How will patches / upgrades from software vendors be handled?
  - What if the entire system has a catastrophic failure? Are there backups that can be deployed within a short period of time?
- Training
  - Who will do the training?
  - How will training be administered?
    - In person
    - Recorded presentation
    - Static documentation
  - How long will training sessions last?

- - How many participants will be in a single session?
  - Will some users require different training than others (power users vs "simple" data consumers)?
  - Will there be any training materials?
- Security Model
  - Who owns the admin credentials?
  - What if someone else needs to perform an administrative task? How will that person get access (will they have direct access to the admin credentials)?
  - Has end-user security been thoroughly tested with all conceivable use cases, and has the testing process been documented?
- Access Methodology
  - How will users initially access the solution?
  - Is single sign-on available?
- User Adoption
  - Does the solution have an advocate / sponsor?
  - Is there an initial communication / awareness campaign?
  - Is there a mechanism to obtain feedback and process change requests?
  - Is there a mechanism to provide ongoing communication regarding new features, data, and/or modifications based on feedback?
- Go-live logistics
  - Will the rollout be phased or "big bang"? Is there a schedule and communication for the rollout?
  - Is there a checklist of tasks to complete and their sequence and schedule?
- Data validation
  - Have automated technical validations been leveraged? Was the validation performed once after the initial data load or will it be performed on an ongoing basis?
    - Sample techniques:
      - Simple record counts
      - Sum up metrics
      - Hash comparisons
      - Check for missing foreign keys
      - ETL log parsing
  - Have the users validated and signed off?
- Is system performance acceptable?
- Will data volumes grow significantly over time? Is there a purging or archiving process in place?
- Ensure sufficient software licenses are available based on initial user needs
- What are the risks and mitigations?