

The Politics of Software Selection & Implementation



**Alliance for Children and Families
2007 National Conference**

Presented by:
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St. Aemilian-Lakeside Milwaukee, Wisconsin



- Founded as an orphanage in 1850, St. Aemilian-Lakeside has evolved into a multi-service agency offering a wide variety of programs and services to children, families and adults.
- Providing foster care, education and mental health services



The Politics of Software Selection & Implementation

 Technical Lingo

 Software Selection tips

 Software Implementation tips

Technical Lingo

Client/Server Application

Web-based Application



ASP – Application Service Provider

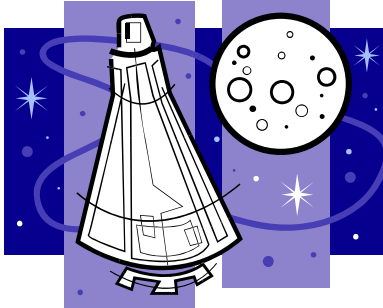
Technical Lingo

Vista



Technical Lingo

Enterprise



Technical Lingo

PICNIC

“Problem In Chair, Not In Computer”

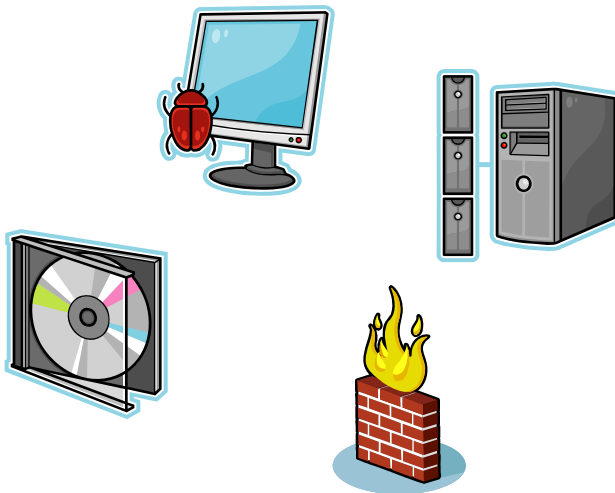


Technical Lingo

VPN – Virtual Private Network



Learn the Lingo...Play Lingo Bingo!



Kevin & Liz's Top 10 List:
Reasons Software Implementations Fail...

- 1 Trying to implement the wrong software
- 2 Lack of effective management support
- 3 Wrong project team and/or leadership
- 4 Poor planning before implementation
- 5 Inappropriate and costly software customizing

Reasons Software Implementations Fail...

- 6 Unprepared and fearful users
- 7 Inadequate hardware/network
- 8 Failed expectations of executives and users
- 9 Excessive dependence on consultants
- 10 Lack of goals and structure



The **Politics**
of Software
Selection &
Implementation

 **Scenario** 

“The Typical Software Demo”

Need volunteers for:

- “Big Kahuna”
- IT person
- Software Committee member
- Software Vendor

Applying
“The Politics of Software
Selection & Implementation”

to
“Stages of Grieving/Loss” by
Dr. Elisabeth Kubler-Ross “On
Death and Dying”

First Stage: Denial & Isolation (where to start)
“This isn’t happening to me!”



- Gather your organizations requirements
 - Current
 - Future
- Gather basic information about vendors functionality and services
 - Implementation and support
 - Cost

Gather Current Requirements:

- System Security
- User names and passwords
- Network design
- VPN
- Outcomes Management
- Report Writing
- Staff Alerts
- System messaging
- Service billing

Gather Future Requirements:

- Is the vendor's current and future technology aligned with your organization's direction?
- Has the vendor been in business for more than 5 years?
- How many behavioral health customers does it have?
- How many in your local area and state?

Gather information about Implementation:

- How long has the software been on the market?
- How compatible is your current information technology infrastructure (operating system, database, etc) with the software package?
- How often has the software been modified?
If often, there could be a problem.



Gather information on Cost

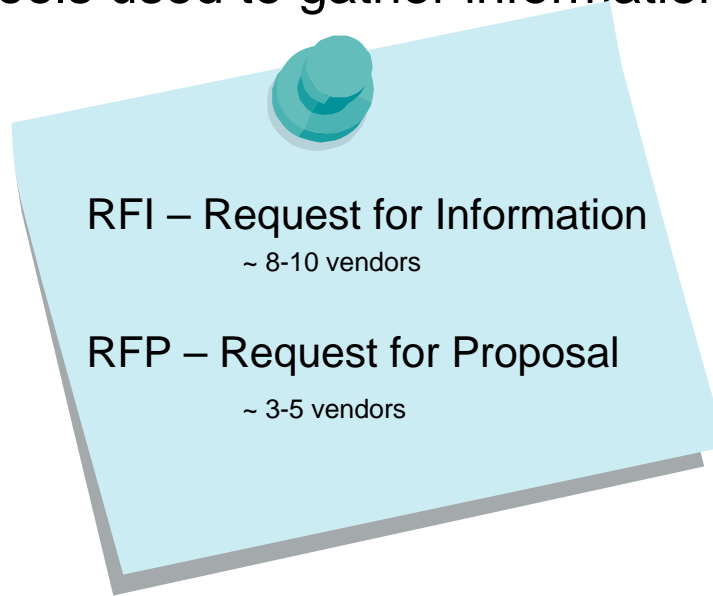


Must also look at:

- other ancillary software needed (ex. report writer)
- hardware requirements
- 5 years of software and hardware maintenance
- internal costs (implementation, initial reduced efficiency, etc)
- external costs (consultants)

Note: software cost may be the least expensive of all costs

Tools used to gather information:



Second Stage: Anger (sales process)

“Why is this happening to me?”



Issue a formal Request for Proposal (RFP)

Smaller companies do not have the time or budget to write and send a formal RFP, therefore, not a required step.

For medium to large organizations, a formal RFP is a good idea.

RFP should include:

- Background on your organization
- Timing of the project and vendor deadlines
- All of your **current requirements**
- Questions that let you determine how well the vendor meets your **future requirements**
- Questions that let you determine how well the vendor meets your **implementation requirements**
- **Cost** worksheet
- Request for references (minimum of 25)

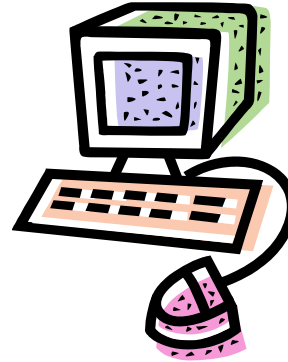
Selection Tip:

Don't waste your time on basic functionality – systems have matured to where the basics are well done.

Focus only on the requirements that are unique or could vary by vendor.

On-site Demo: Preview Software

- Scenario based, scripted demonstration
- Set time limit (2-3 hours)
- Have a scoring system



Call references!

Select from the client list, pick comparable organizations, pick 3-5 references (5 is ideal)



Selection Tip:

Reference calls are gold time...make this a long conversation, find out about response time, customer service, length of implementation, etc.



Software Selection Tips...

- Try to go on-site at least once.
 - A vendor with nothing to hide will gladly facilitate contact and visits, and many will pay for site visits.
- Attend a user group meeting.
- Look at financial stability and long term viability of the software vendor.



Selection Tip Summary...

See it!
Taste it!
Access it!
Break it or
Buy it!

Third Stage: Bargaining

Enter into some sort of agreement



Contracts

- Look before you leap
- Have a lawyer review contract



Contract Tips...

- Negotiate the price and the contract – it is a buyers market...you will get a minimum of 10% off the first quote.
- Vendor's deliverables are on a scheduled delivery.
- Covers all aspects of support and maintenance.

Contract's language must reflect that all work be performed and completed to your satisfaction.



Contract Tips...

- Covers all hardware and software upgrades
- Be a strong customer and use whatever power and leverage you have, do not be timid in the negotiation process.
- Contract with penalties \$\$

Statement of Work (SOW)

- A narrative description of projects or services to be supplied under the contract.
 - Vendor supplied

Nonsoftware Services

- Any “soft” services vendors offer apart from the actual tool they are selling. Soft services are as important than the software tool’s functionality itself.
- Customer service should make a difference in your decision about which vendor to work with.
- Does the vendor listen to what you are asking/saying?



Fourth Stage: Depression

Overwhelmed



- Implementation
 - Have fun!
 - Get everybody involved!
- Training
 - Nobody has ever said “I wish we wouldn’t have done so much training!”



Implementation



Implementation

- Need an implementation team
 - Experienced* project manager from vendor
 - Dedicated* project manager from organization
- Management must be seen to be engaged and “hands-on” in the process is critical in communicating the right message.
- Need a detailed Implementation Project Plan
 - Weekly or Monthly meeting updates

Software Adoption

- Big Bang
- Phased
- Parallel



Phased implementation

(recommended)

- Adds acceptance and awareness and skills with every increment.
- Training, documentation and reviewing are manageable.



Software Implementation Tips

- Understand existing **business processes** and seek opportunities for business process **improvement** – talk to the people who do the work. Remember the devil is in the details. Identify ways to improve business process.
- Go backwards...look at reports, data needed, then adjust implementation based on priorities.

Software Implementation Tips

- Setup system so end user understands terminology
- Communicate
 - Newsletters
 - Bulletin boards
 - e-mail
- Listen to end users
 - Balance

Knowledge is the key...

Train

Train

Train



Software Training Tips

- Keep group training sessions short (1-2 hours)
- Keep group training sessions small (< 8 people)
- Have a training system loaded on computer
- Offer one-on-one sessions if needed
 - Face to face
 - via internet
 - CBT (computer based training)

Fifth Stage: Acceptance

“I’m ready for whatever comes”



- Go-Live!!
- Implementation and Training is an on-going process.
- Change is a Force for Good
 - Job responsibilities will evolve

Good software,
good selection &
good implementation...

like a fine wine,
takes time.



Scenario



“The Ideal Demo”

Need volunteers for:

- “Big Kahuna”
- IT person
- Software Committee
- Software Vendor

The Politics of Software Selection & Implementation Summary



- Know the lingo
- Gather information (RFP)
- On-site scripted demos
- Get help with the contract
- Be aware of “soft” services
- Involve staff with implementation
- Train, train, train
- Enjoy the efficiency of an automated system

