Diving Into System Implementation
While Still Keeping Your Sponsored Project Operations Afloat

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Learning Objectives

1. Identify challenges and pitfalls of system implementation in order to develop a wholesome implementation plan.

2. Evaluate the impact on existing business processes and effectively communicate challenges to leadership and customers.
Case Study

University of Oz (UOZ) uses a internally developed grants management software unique to its institution which as been in use since 2000. This “home-grown” system has historical data and is maintained continuously to meet the needs of the central office and campus end-users alike. There are two programmers on campus that know the software language and architecture; they provide maintenance and develop enhancements based on user requests. The Vice President has identified this is not a sustainable model and a new system must be implemented. UOZ executive leadership agrees to move forward with purchasing the grants management module as part of the system suite already being utilized for human resources, students and finance. Once the purchase is approved, the VP hands off the project to the two executive directors to lead the implementation, with the only parameters being: ‘get this done’.
Types of System Implementation

1. Phased
   • Smaller scale releases projected out
2. Parallel
   • Operate old and new systems simultaneously
3. Pilot
   • Small group of users transition to new system
4. Direct
   • Switch all functions over at a given point in time
Where to start?

• Develop a Plan!
• Understand end goal and deadlines
• Identify external resources (monetary)
• Identify internal resources (subject matter experts)
• Understand your limitations
• Communicate with all stakeholders
Implementation Plan

- Assign roles and responsibilities
- Set realistic timelines for project tasks
- Review data integrity and elements
- Create and revise documentation
- Identify process gaps
- Develop reports based on user requirements
- Evaluate need for enhancements
Challenges & Pitfalls

• Impact on day-to-day operations
  • Delayed response times
  • Redistribution of resources

• Impact on business processes
  • Changes processing time
  • Changes in system controls
  • Changes in standard operating procedures
Operational Impact

- Short term impacts
  - Stretched resources
  - Stressful work environment
  - Delayed response times
  - Delayed turnaround times

- Long term impacts
  - Transparency
  - Automated processes
  - Policy-driven processes
  - System controls
  - Continuous improvement

Present

Future
Effective Communication

- Keep stakeholders apprised of plan and progress
- Relay operational impacts
- Solicit feedback from user groups
- Post updates to webpage
- Invite users to preview system
- Showcase progress institution-wide
Post Implementation Plan

• Transition SME(s) to functional analyst(s)
  • Point of contact for users during implementation
  • Active involvement in documentation & training
  • Maintains role after implementation
  • Develops system and process enhancements

• Roll out training
  • Train the trainer
  • Internal training takes precedence
  • Prior to implementation date
Lessons Learned

• Start with the end goal in mind
• Utilize SMEs & end users
• Have a contingency plan
• Be transparent with all stakeholders
• Provide positive reinforcement
• Focus on standard functionality
• Save enhancements until later
• Survey users during implementation phases
• Don’t forget about reporting!
Questions?

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