

WHY DO UPGRADE PROJECTS FAIL?

An ideal project, be it an upgrade, a new module or a full implementation, go-live should, in essence, be a non-event. From our experience and comments from our customers, here are the **Top Ten Pitfalls that can cause projects to fail and how to avoid them**. Although the focus here is on JD Edwards upgrade projects, many of these would apply to any technology project.

1

SENIOR MANAGER BUY-IN

WHY

- Project justification
- Important on larger projects
- Not having this is a huge project issue
- Need to rationalize and justify the upgrade to them to allow this buy in to happen
- Ideal executive sponsor has “paycheck responsibility”

HOW TO AVOID

- Set up ERP Governance Model
- Get them involved with project submission and approval
- Really show the benefits of the upgrade
- Educate on impact of the project
 - On the business
 - On the P&L
 - On risk management for statements

WHY

- Work involved is often underestimated
- For each module in JDE you are using, plan for at least 50% FTE
- Not taking into account vacations, other projects, lottery wins
- You have to make sure they get the work done!
- Commitment vs. Involvement

HOW TO AVOID

- Backfill positions with temporary staff
- Consider staffing as an ongoing process/need
- Consultant fill in can help (cost increase)
- Lengthen project timeline
- Proper documentation/scripts/plans from prior projects to help lighten the load

2

INTERNAL RESOURCES AVAILABLE

3

INTERNAL RESOURCE SKILLS

WHY

- The ones you can least afford to pull away from current tasks
- Attitude is as important as aptitude
- Knowledge of processes and openness to different/new ways
- Knowledge of the business itself (especially if changing business processes)
- NOT the place for a rookie or naysayers

HOW TO AVOID

- Positive people who embrace the changes, keep the spirit of the project up, team players
- Use influencers
- If replacing departing staff, look for JDE experience
- Plan ahead
 - Where should team be in 2 to 4 years?
- Document, document, document

WHY

- Largest project killer once it gets started
- Scope creep is reflective of the "personality" of the project
- New items discovered during the project
- Items not discovered earlier, often related to interfaces and integration
- Problem with user buy in if not managed properly

HOW TO AVOID

- Define scope early and as clearly as possible
- Plan for the upgrade type, timeframe, what's included/excluded
- Change control
- Some changes are needed and shouldn't be ignored
- Contingency plans and risk management
- All about Project Management

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SETTING & MANAGING SCOPE

5

EXCHANGING INFO

WHY

- Lack of communication to team, to management, and to organization
- Surprises can kill a project
- Cross function teams not communicating results in holes in the project
- Unknown expectations
- The larger the project, the bigger the impact

HOW TO AVOID

- Identify approach and expectations from senior staff
- Project plans from PMs
- Scheduled status and steering committee meetings
- Communicate with whole organization
- Staff can't be afraid to speak up

WHY

- Interfaces/integrations you have in place now
- Any related technologies that also need to be upgraded/replaced
- Hardware and software dependencies/co-dependencies
- Competing projects
- Disaster Recovery
- Output Management

HOW TO AVOID

- System diagram that covers everything and is updated
- Anticipate what else is going on in the organization
- Update disaster recovery plan for changes that are in the upgrade
- What else needs to upgrade in order to upgrade?

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NON-JDE ITEMS

7

NOT SETTING UP FOR WINS

WHY

- Not actively looking at ways to improve the business
- Not taking advantage of the time you've invested now
 - Extend it a little to gain extra wins
- Upgrade projects can be long, "project fatigue" sets in and impacts the project
- Improper assumptions cause stress and anxiety

HOW TO AVOID

- Break large projects into stages and celebrate them
- "What are your challenges?" sessions with core/key users
- "Where is the business going?" sessions with senior team
- Product and process champions
- Track user calls/issues

WHY

- How many of the staff on your last upgrade were involved with your prior one?
- How much of your last upgrade will be similar to the one you previously completed?
- Staff turnover, dependency of certain individuals who have left
- Dependency on implied or trusted knowledge

HOW TO AVOID

- Capture knowledge to effectively deal with changes when they happen
- Update internal process documentation
- Make documentation a diligent part of the project
- Test staff and see where applied training will help
- Join a learning SIG or a UPK SIG

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KNOWLEDGE RETENTION PLAN

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NOT A "REAL" PROJECT

WHY

- Not treating it as a real project
- Viewed as "just a tech thing"
- Custom code, DW versions, reports, enhancements included in the base code, mods that are being retired
- Not preparing for all the changes that come with upgrades
- Assuming that things will work

HOW TO AVOID

- Have a manager, have a plan
- Review what you're doing with the project and plan accordingly
- Testing, testing, testing
- Even a pure technical upgrade requires testing and user involvement

WHY

- The easy route with upgrades: get it done and get current
- Not actively looking to improve
- When project/upgrade ends, everyone goes back to business as usual
- Project fatigue and pressure to get on with life comes in
- Not planning for improvements to start in order to get in motion for next project

HOW TO AVOID

- Debrief meeting
- Where is the business going? What from the ERP side can help?
- Ongoing process review and documentation
- Don't let knowledge/skills/lessons learned fade away
- Plan for next stage based on feedback
- Review options and talk to users about larger functionality

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PLANNING THE NEXT STAGE

THE SUCCESSFUL SIX FOR FUTURE PROJECTS

1. Document Your Lessons Learned

Do a project wrap up and honestly review what worked/what didn't

2. Plan All Year Round

Continue your planning all year round, not just before the next upgrade

3. Share Your Experiences

Tell your tale at events/user groups - you never know who might benefit from your story

4. Name That Project

It helps to promote ownership of the project and gives a sense of camaraderie amongst the team

5. Celebrate Success

Celebrate milestones and have something special for the team at the end

6. Keep The Team Involved

Utilise Subject Matter Experts (SMEs) and solicit their input for the next upgrade, any issues, or for future ideas

CONTACT US TO LEARN MORE



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