

EAP Expert Implementation Guide - The Planning Process

Implementing EAP Expert Software in your organization to use it effectively to solve some of your business problems should be done carefully and in phases. Implementing an EAP Expert system involving integration on a local area network (LAN) for multiple-user access requires careful consideration and planning. A large EAP with multiple locations will experience different challenges than a smaller EAP with one location and only a few users. Experience has shown that those organizations that use the methods discussed in the next several chapters achieve their implementation successfully and in a timely fashion.

Planning

The key to successfully implementing EAP Expert is a good implementation plan. A good implementation plan defines the general goals you want to achieve, the system requirements you have to meet, and the timeframe to complete the plan. Business requirements and processes are also mapped to the application.

The implementation plan should include:

- Creating the implementation strategy.
- Identifying the implementation team.
- Creating a schedule.
- Analyzing your business processes.
- Identifying hardware and software requirements in addition to current organizational resources and how any new resources are to be integrated into existing systems.
- Determining customization needs and data import requirements.
- Identifying reporting requirements.
- Identifying training and ongoing support requirements.

The Implementation Strategy

The implementation strategy can be as complex and detailed as required for your organization. The following are some suggestions for the contents of your strategy:

Create a statement of work and change-management process. Making decisions about what work needs to be accomplished, and how to request, review, and approve changes during the implementation are two important areas to determine early in the process.

Set a target date and budget for deployment. While these figures will most likely change during the implementation process, it's useful to have guidelines. If you are planning a phased deployment by location, functionality, or both, set target dates and budgets for each part.

Identify the risk factors. Some risk factors might include delivery of new hardware and software, dependencies on essential personnel or outside vendors, deployment timing, and users' resistance to change. When possible, make contingency plans to reduce risks and dependencies. These plans might include additional training, internal public relations, and support.

Identify the business goals. Determine what the business goals are and calculate the return-on-investment (ROI) and the total cost of ownership (TCO).

Assign responsibility. Designate someone who will be responsible for tracking costs, schedule, performance, and risk factors. Define an escalation process and identify who is responsible for making final decisions.

Identifying the Implementation Team

The responsibility for a successful EAP Expert implementation should be shared with several people and organizations. Some of these include your EAP Expert rep., consultant, or other value-added partner, as well as those specific individuals inside your own organization that are needed to participate on your implementation team. These individuals will actively work to implement EAP Expert in your business.

The responsibilities of an implementation team are to:

- Develop an installation strategy.
- Identify who will perform the various steps.
- Create an implementation schedule.
- Define a progress-reporting plan.

Members of the implementation team should include people with organizational and planning skills, a comprehensive knowledge of the day-to-day business operations of your organization, and knowledge of EAP Expert. The team should also include your system administrators whose technical experience should include Microsoft Windows® security, client/server networks, database administration, and Web technology.

The number of individuals involved in implementing EAP Expert depends on the size of your organization. To avoid task and time-responsibility conflicts, it is important that members of the implementation team are either full-time resources or are able to schedule implementation-related tasks as a priority, especially if deployment is to a large number of users. Team members and their managers must understand and accept the commitment required.

Each member of the team must have a well-defined role and set of responsibilities. These roles include:

Business owners and managers

Business owners and managers provide the leadership necessary for success, as well as guide decisions about the way EAP Expert is deployed. While they do not need to understand the details of installation and configuration, they must be aware of the system configuration and maintenance requirements.

Executive sponsor

In small organizations, this roll may be the same as the business owner or managers. In larger organizations, this person provides the link between the project manager and upper management. This person must understand the details of the installation and configuration, the schedule, and work with outside vendors.

Implementation project manager

The project manager is the person who directs the work and makes things happen. This person must understand the details of the installation and configuration, the schedule, other team members and their contributions, and work with outside vendors.

System administrator/database administrator

The system administrator sets up and configures hardware, installs operating systems and supporting software, and installs the EAP Expert software. In smaller organizations, your Microsoft Partner may handle these tasks.

The database administrator maintains and backs up your business data. Depending on the size of your organization, your system administrator or another role (such as someone in operations) might also be assigned the database administrator role.

Operations personnel

Your operations personnel are responsible for maintaining the system on a day-to-day basis, ensuring good system health, and disaster recovery. In smaller organizations, these roles may be shared with the system/database administrator.

Create a Schedule

Creating a schedule is one of the important jobs of the implementation team. A schedule should list the steps involved in implementing and deploying EAP Expert, time requirements for each step, and who is responsible to make sure the tasks are completed. It may also identify any risks and dependencies.

The following list identifies the main tasks associated with implementing EAP Expert:

1. Hardware and software
 1. Determine requirements and specifications
 2. Acquire, install, and configure
2. Install EAP Expert
3. Customize the EAP Expert application (if required)
 1. Analyze the business process
 2. Determine customization requirements and specifications
 3. Approve and freeze customization specifications
 4. Develop
 5. Review
 6. Test the system
 7. Get pilot group to use product
 8. Finalize
 9. Process audit
4. Training
 1. Schedule administrator training
 2. Schedule user training
5. Deployment
 1. Deploy EAP Expert to the organization
 2. Perform the import of legacy data (if importing)
 3. Validate legacy data after installation
6. Post-deployment follow-up
 1. Hold a post-implementation audit or review (after about 3 months)

Analyze Your Business Processes

The best way to analyze your business processes is to use members of your organization who know your business processes. Usually, the experts are the department heads or the people they appoint to do the tasks as part of their job. A successful implementation is ultimately dependent on its usability and the willingness of users to use it, so it's critical to engage these experts early in the process.

The tasks to analyze your business processes are:

- Find out what processes are in place. For example, how accounts are created and managed, how clients are entered, how inventory is tracked, and how customers are billed.
- Find out what users think about the system in place. For example, is it effective, is it time-consuming, and are there processes that can be streamlined or dropped altogether?
- Find out what expectations users have of EAP Expert. For example, are they excited about using a fully integrated EAP System, or do they have reservations and questions?
- Examine the processes in place and find out if they stand up to the scrutiny of smart business practices or if they continue to exist because no one wants change.
- Learn the features of the EAP Expert product and how they relate to current organization processes and procedures.
- Determine what reports are necessary and part of your current business process.
- Determine the components and features that will be implemented and deployed first and when additional components and features will be added later.
- Incorporate the processes into EAP Expert. Determine if the processes can be recreated as they currently are or if changes must be made to incorporate the application and use its new functionality.

Identifying Hardware and Software Requirements

An inventory of your current hardware and software will help determine what you already have that can be used as part of your EAP Expert implementation, and what must be purchased before implementation can proceed. If you need to purchase additional hardware or software, verify availability and delivery dates. These dates—as well as the time required for installation—are external dependencies that have an impact on the schedule.

Determining Customization Needs and Data Import Requirements

EAP Expert can import data from many different sources. Call today for more information on data importing.

Identifying Reporting Requirements

From the analysis of your business process, the current reporting requirements should have been identified and listed. Using this list, you can map your current requirements to the reporting capabilities of EAP Expert.

Identifying Training and Ongoing Support Requirements

At some point during the EAP Expert implementation, someone should be designated as the system administrator and assigned to manage the ongoing system (this may be someone already in your organization or an outside person or company who is under contract to perform this function). This person must be knowledgeable about system administration, the organization, and the implementation.

One of the keys to a successful implementation—that is, to ensure that everyone can use the system properly — is to provide training and support for all users. Administrators and managers should be trained to manage the system, and users should be trained in common usage. One effective way to provide training is to schedule hands-on training before organization-wide deployment, so users will be able to put what they have learned into practice as soon as possible.

Development

This phase can include any or all of the following activities, depending on your implementation plan:

- Setting up hardware and installing software.
- Installing EAP Expert in a limited use and test environment.
- Testing EAP Expert.
- Importing or migrating data.
- Customizing the application and the reporting features (if required).
- Integrating EAP Expert into existing systems (if required).

Deployment

Prior to organization-wide deployment, it is a good practice to identify a group of users who can use and evaluate the product installation in a controlled setting. This group should perform the common activities that their jobs require, such as creating accounts, reviewing data, and sending e-mail. Observe their actions to find out what difficulties may exist and address those during training. Make sure that all users have been set up with usernames and passwords, and that they have attended training to help them become familiar with the software.

Post-Deployment

Although users may be given training and job aids to help them get accustomed to a new product, if they do not use the product, the organization will not realize its return on investment. A successful implementation plan should include change-management efforts and post-deployment follow-up to determine if your work force is using EAP Expert. Deploying EAP Expert may involve significant change in process and daily tasks for members of the organization. A successful deployment ensures that issues and areas of resistance related to this change are identified and addressed through training, coaching, and other change-management practices.

The following list identifies some of the operational changes associated with transitioning to EAP Expert:

- The organization must develop processes and tools that will add long-term customer value. The organization must be an active participant in marketing activities to generate customers and create brand loyalty.
- Initial deployment period will affect productivity in the beginning. Learning a new way to accomplish daily tasks is time-consuming and might be frustrating. This could result in an initial reduction in productivity.
- Customer relationships are owned by the organization, not the individual. Customers become organization assets, not clients of the salespeople they work with. This means that if a salesperson leaves, their customer relationships remain with the organization instead of leaving with the salesperson.
- Users must see EAP Expert as a tool to help them. If they instead perceive EAP Expert as a tool for organizational efficiency analysis and resist using it, the data the system generates will be inaccurate.

Department managers must be on hand to set an example and support the implementation, both by talking about it and using it. Executive managers must demonstrate an on-going commitment to show that using EAP Expert is a permanent change.