How to Plan for a Successful Deployment

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FOR GROWING ORGANIZATIONS WITH LIMITED RESOURCES, EVERY DECISION MATTERS. Deploying new enterprise technology that impacts the core of your business doesn't have to be intimidating. With careful research and evaluation, it's possible to find a technology provider that will support you through this journey. One that offers a solution that meets your business requirements and KPIs. It should also include a deployment methodology with ongoing customer support, training, and continuous updates. With the proper planning, the transition to a new business system can be smooth, efficient, and successful. Here's a practical guide to help you through the process.

Plan for Change

KEY GUIDANCE

If your current technology is not delivering the results you need to move your business forward, it's time to consider a change.

A new cloud technology can fundamentally shift the way people work inside your organization. It's iterative and equips you for long-term change, evolving with the needs of your business. Define your goals and scope of work, then consider what you want to implement now and what can wait, and address your top priorities first. Establish a timeline based on your overall business priorities. If you're clear about what your vision is now and can determine how to achieve it, your outcome is more likely to reflect it.

Questions to Ask Yourself

What are the business challenges I need to solve?

How will new technology help solve them?

What goals do I want to achieve?

What is the scope of work?

How will I measure success?

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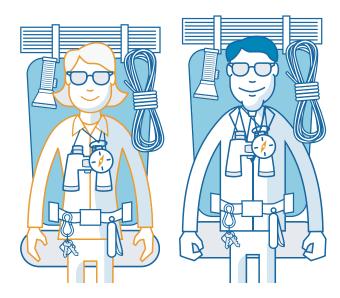
Identify Your Technology Provider and Deployment Partner

KEY GUIDANCE

Once you've established the scope and goals for the deployment, it's time to identify and engage the resources you'll need to move forward.

Identify Your Technology Provider

Look for a provider that offers the technology to help you meet your business goals and a deployment approach that has a proven track record and fits your budget and timeline. To get an idea of the scope, budget, and timeline of your deployment, ask your provider for references of customers similar to your organization that have gone through the same type of deployment. Ask these customers about their postdeployment experience and the continuous support and resources the technology provider offers, such as ongoing guidance, training, and enablement for future feature adoption.

“ The technology provider offers the deployment methodology, training, support, and continuous updates.

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Identify Your Deployment Partner

After selecting your technology provider, choose a deployment partner to help you plan the tactical details of your deployment and define the core functionality you need to successfully transition to the new platform. Most technology providers have an ecosystem of partners they can recommend. These often vary in quality, experience, expertise, and deployment consistency. Some providers require their partners to only pay a fee and pass a certification test to offer deployment services. Others are much more selective, requiring their partners to take annual training and recertify for significant product upgrades. Since this is the beginning of a long-term partnership, choosing a technology provider with partners whose services most align with your business needs and can evolve with your organization is critical for both your deployment and long-term success with the solution.

W Workday Services Partner

> " The deployment partner manages the details of your deployment and beyond.

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Build Your Internal Teams

KEY GUIDANCE

Once you've lined up your external resources, it's time to pull together your internal resources. Both your technology provider and deployment partner can help you set expectations for the team and their managers to ensure that resources are identified and aligned.

Successful teams:

- Educate and communicate by sharing the deployment vision, objectives, scope, and timeline

- Set expectations for time commitments with both team members and managers by prioritizing internal projects and planning for backup to avoid potential project delays

- Plan for contingencies—ask your deployment partner for guidance on when to be flexible and how to balance your team's day-to-day responsibilities with deployment priorities

> **Functional and technical leads** provide expertise during deployment.
>
> **Internal champions** promote and communicate the benefits of the new technology to employees.
>
> The **executive sponsor** engages the leadership team for its support of the deployment, provides the escalation path, and keeps leadership informed.
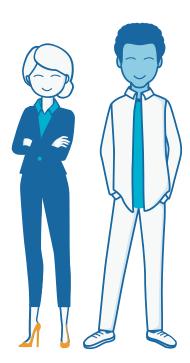
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Determine Executive Sponsors

If you don't have one already, you'll want to find an executive sponsor. The executive sponsor is critical for communicating to leadership the reasons the new technology is needed and the benefits they can expect, as well as ensuring that the project is executed to align with the organization's strategic goals. The executive sponsor also helps keep your leadership team supportive of your change management plan. It's important for project team leads to maintain an active partnership with the sponsor as the deployment goes into production. Get input on priorities and goals, keep the sponsor updated on your progress, and establish a clear path to manage escalations should they arise.

> " By identifying the right deployment partner, internal functional and technical leads, and executive sponsor, you are setting your company on a path to a successful deployment to make your vision a reality.

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Prepare Your Data and Processes

KEY GUIDANCE

You've selected your technology provider and deployment partner, internal stakeholders are aligned and on board, and your plan is defined. Now it's time to prepare your data for the new system. To get started, meet with your internal teams, such as HRIS or IT, to ensure that data requirements are identified early.

Take Inventory

Prepare for critical-path items—such as reports, integrations, and other systems you are running—to determine the data that is most important to migrate/transfer. Take this opportunity to clean up your data and consolidate it across multiple systems. Define the competencies that you can leverage long-term, and look to streamline and automate policies. Deep cleaning and heavy lifting now will pay dividends in the future. Always consider your scope, budget, and time. You can't increase one without increasing all three.

Consolidate Processes and Programs

New technology gives you the opportunity to reevaluate and redesign your processes and determine how they impact your organization. Consider ways to improve consistency while still allowing for global nuances without having to over-engineer your workflows. Initiating this process now will enable you to adapt to the new technology as you introduce new features and functionality.

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Promote the Benefits

It's important to manage the new technology and how it impacts your stakeholders and users. Without change management, no matter how seamless your deployment was or how sophisticated your technology is now, your original goals, benefits, and ROI are still at risk.

Depending on your company culture, identify the best channels for communication across the organization to help inform the workforce ahead of time. Think creatively to engage in a meaningful way through videos, job aids, gamification, and more. Comprehensive and creative communication can help ease your workforce's transition to the new system.

Continue to work closely with your technology provider and deployment partner. They can help facilitate ongoing updates and the adoption of new features and functionality. They should also provide you with training and education opportunities and a community where you can share your experience with other customers and learn from them as well. Leading technology providers will also assign you a customer success manager to assist you with business reviews, support needs, and training recommendations to improve your solution knowledge and increase your self-sufficiency.

Before you go live, identify coworkers who can help you champion the new technology solution and its benefits within your organization. Influential stakeholders in cross-functional departments are especially useful to help during each phase of the deployment. Whether you assign them a formal role or simply leverage their feedback and input, a team of internal champions is instrumental in communicating the benefits the new technology will bring to the employee experience.

Going live is just the beginning of the journey, and it's critical to keep the momentum and plan for the rolling adoption of new features and functional areas to support your evolving business needs.

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The Payoff

WHEN DEPLOYING NEW TECHNOLOGY THAT FUNDAMENTALLY SHIFTS HOW YOUR ORGANIZATION OPERATES, it's worth the investment to find a solution that not only meets your business objectives for today but can also scale as you grow. Relying on an outdated system to evolve with your organization can put your business at risk. With the right technology provider and deployment partner, you're setting the foundation for long-term success. Deploying with a technology provider that meets your time and budget requirements and that offers continuous innovation and a system that grows with you is an investment in your future. Instead of redeploying a different solution in three to five years, you'll be seamlessly upgrading new capabilities into a solution that's already integrated within your business. It's about the right priorities and the right relationships with the right people that will help empower the success of your organization.

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