Preface

On the surface, this is a book about software upgrades; however, at its core, this is a book about organizations and the people, processes, and technology that compose them. Thus, this is a book about information systems (IS) and the management of information technology (IT). I began my career in information technology by working at an IT help desk. Eventually, I moved into software development and then into consulting. Now, I have moved into academia to pursue research interests, specifically research in software upgrades. In each position that I have held, and in each company for which I have performed consulting work, I have seen the impact of changing technology, and I am certain that all readers have seen its impact as well. Unfortunately, even though changes in technology are a given in today’s society, there is a lack of mainstream knowledge about how to manage effectively the organizational changes associated with changes in technology.

Upgrading software is only one type of technological change, but it is certainly one of the most prevalent in modern organizations, given the rapid pace with which software vendors release new versions. Every single IT manager with whom I have discussed software upgrades points to the need for successful management of end users, management support, proper training, and other organizational issues as critical success factors in the management of software upgrades. This is consistent with findings by IS researchers who have identified these factors and others as key factors in the success of any IS implementation. Although there are many technical issues that must be resolved as well, including deployment options and accompanying hardware/software changes, this book focuses primarily on the presentation of tips, techniques, and strategies to help IS managers deal with the user and organizational problems that are often associated with software upgrades.

Why focus on primarily non-technical aspects of upgrades? Quite simply, this book was written at the request of practicing IT managers. There are many, many books that deal with the technical aspects of upgrading specific packages. For example, all the technical aspects of upgrading from one version of Microsoft Windows, to another can be found in books from Microsoft Corporation as well as numerous third parties. On the other hand,
there are few, if any, books to help an IT manager deal with the organizational issues associated with the transition. There is a great deal of research to help the practicing manager, but to find it, one has to consult numerous periodicals and books to synthesize and interpret the relevant information.

This book has two major features: (1) a discussion and analysis of the most current techniques for managing software upgrades based upon recent field research, (2) an in-depth treatment of critical topics through carefully selected research papers. Through these two vehicles, my goal is for the reader to take from this book an enhanced understanding of the state-of-the-art in knowledge about managing the user and organizational aspects of software upgrades. In the interest of readability, I have purposely omitted the details of the statistical procedures used to analyze the data collected in the survey; however, I will be more than happy to share this information with any reader who is interested. The same holds true for details of the theoretical development of the model in the book along with a comprehensive literature review. Please feel free to contact me if you are interested in the details of the data analysis or literature review (or anything else), and I sincerely hope that you find this book both thought-provoking and useful.