Chapter 21

Implementation Planning

OVERVIEW

In this chapter, we provide guidelines for implementation planning, along with techniques that can be used during the implementation process to facilitate a successful project outcome. This includes satisfying the operational, technical, and financial objectives of the IDCM initiative, and providing guidelines for postimplementation review.

Our objectives in this chapter are as follows:

• Discuss the development of an Implementation Strategy.
• Discuss the requirements for a Project Execution Plan.
• Review the requirements for a Quality Plan to support the processes involved in development and implementation of an IDCM solution.
• Consider an initial set of risks that can be useful to capture at the commencement of an IDCM implementation, and discuss the requirements for an Issue Register and Risk Register.
• Review the requirement for the development of an effective Change Management Strategy and action plan.
• Consider the contents of an effective Communication Plan for an enterprise IDCM implementation.
• Discuss the typical requirements for a Data Migration Strategy to migrate existing (relevant) document registers and objects to the IDCM.
• Consider scenarios for backfile conversion of (relevant) hard-copy documents and the development of a Backfile Conversion Strategy.
• Consider the typical requirements for training and development of a Training Plan.
Define a strategy for testing the configured IDCM, covering System Integration Testing and System Acceptance Testing strategies, and the development of Test Specifications and Test Plan(s).

Review the importance of the Postimplementation Review study in the evolutionary deployment of an IDCM solution.

IMPLEMENTATION STRATEGY

This strategy defines the overall methodology by which the implementation stage of the IDCM product life-cycle will be achieved. The implementation strategy is typically defined (at least at an abstract level) at project initiation and incorporated in the Project Charter (refer to Chapter 6). The strategy needs to be aligned with the aim and objectives of the IDCM strategy, be complementary to the defined scope inclusions and exclusions, and be cognizant of the change and risk management strategies identified in the charter.

It is not unusual for an implementation strategy to have several iterations, particularly for complex IDCM solutions. The strategy may be changed when new knowledge is acquired about the implications of the implementation strategy, or there is a change of management direction. For example, as we mentioned in Chapter 11, the requirements of system changeover or data migration identified during the preliminary investigation of feasibility, or during detailed requirements analysis, may have implications for the implementation strategy. A final strategy may not be determined until a contract has been executed with a supplier.

An implementation strategy might be defined or iterated at the following key points in the product life-cycle:

- Project initiation — This is the initial abstract definition of the implementation strategy, aligned with aims, objectives, scope, change, and risk management.
- Preliminaries — The implementation strategy might need to be revised based on the operational, technical, and financial assessment of business and technology solution options.
- Requirements analysis and definition — The strategy might need to be reconsidered based on the nature of the functionality required and the likelihood of it being delivered successfully within the framework of the implementation strategy.
- Package selection/business case/contract negotiation — The knowledge acquired during the package selection, business case, and contract negotiations may have a bearing on the viability of the implementation strategy.

The final implementation strategy should be articulated in a Project Execution Plan (or Implementation Plan), the components of which we will now review.

PROJECT EXECUTION PLAN

The Project Execution Plan is a vital planning document that defines the implementation stage of a project. It draws on earlier project documents, such as the project charter, feasibility study reports, requirements specifications, and contract agreement executed
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