

# C-SERPENTS AND OTHER MYTHS: IMPLEMENTING YOUR COMPUTER SOLUTION

by Warren S. Reid

*The huge beast moved quickly and silently beneath the surface of the water with the slightest move of its tail. Above it were the legs and torsos of swimmers playing in the sea, their vacations going along perfectly, just as planned.*

*They had heard about the beast, had read about it, but who could believe they would actually ever be staring at it. No...this could never happen to them!*

*The beast opened its great jaws and with the force of a juggernaut was upon them...*

The jaws of many computer systems implementations are also wide open and ravenous. The firm did everything right: used a consultant; identified its business requirements first; prepared a Request For Proposal; reviewed and analyzed responses; checked references; attended demonstrations; and signed a "perfect" contract. Why, then, is their party suddenly interrupted by a C-Serpent? (Computer Serpent—many times bigger than a simple computer bug.)

They've heard and read about failing computer installations at other firms. They've read about vendors successfully suing users and users successfully suing vendors. But they'd done everything right. Why are they now being visited with frustration, disruption, missed deadlines, low morale, and inadequate systems performance?

The answers are not simple. My experience shows that several myths still exist regarding systems implementation and these myths can cause even the best systems to fail. While having committed and supportive personnel is an absolute necessity, it is not enough. Planning and project management continue to be essential. Yet many myths cause these essentials to be ignored, especially where software application packages are involved. These myths, like most myths, appear rational and "convenient," which causes them to be perpetuated. Building a system on these mythical precepts, however, is like building your house on a watertrap. In fact, if architects built buildings the way most companies implement systems, the first woodpecker to come along would destroy civilization.

## **Myth No. 1: There Is No Need For A Detailed Implementation Plan.**

The implementation of an application package requires most of the same steps as a custom system does. While there is no need to design, code, and test the newly developed programs, all the other steps are still required. These include:

- Identifying and planning hardware site, appropriate air conditioning, line conditioning, uninterrupted power supply, lighting, sound-

proofing, security, etc.

- Changing firm procedures to integrate and support the new systems.
- Training affected individuals.
- Designing, ordering and implementing new forms.
- Testing the application package in your environment.
- Loading all of your data onto the new system.
- Changing over to the new system.

These steps and relevant sub-steps should be identified in a detailed project implementation plan. Starting with the vendor's plan, challenge it and prepare a plan that makes sense for your firm in terms of timing and content. Revise it as necessary as the project progresses. Remember, this is *your* project—not the vendor's! Define major tasks to be completed, assign responsibility and completion dates, and identify hours to complete each task.

## **Myth No. 2: Your Staff Will Love It (or A project team that includes users is not necessary!)**

Nothing dooms a project to failure like a system "forced" upon those who must use it. Avoid this problem by assembling a project team consisting of users, the vendors, and members of data processing where applicable. Select a project manager. The project manager need not be a data processing technician. Rather, he or she should have the following characteristics to keep morale up and the project on target:

- Enthusiasm, high energy level.
- Leadership capability, communications, and project management skills.
- Problem solving ability.
- Knowledge of the firm as a whole and how departmental functions interrelate.
- More enthusiasm (a cheer leader, a yeayer).
- A builder of "Esprit-de-Corps".

There is a new word in the dictionary called "Cyberphobia" which means fear of computers. The existence of a computer system in your office can cause all kinds of concern, fear, resistance, and confusion. Why? Computerization results in change. Even if the old ways are not working, they are familiar and comfortable. Plus, there is a common fear of the computer itself. Here is where the project team and the project manager can help. By soliciting user concerns and ideas, and communicating through open discussions about project plans, progress, and the impact of the system on employees, many of these fear barriers can be broken down. The project team must meet regularly to perform the tasks on the time-phased implementation plan. At project team meetings, the project manager should lead the review of progress made, assist in identifying and resolving problems and identifying tasks to be accomplished in the following period.

The project manager should have access to a Steering Committee of top executives to resolve higher level problems, policy issues,

and organizational conflicts, and to report overall progress.

## **Myth No. 3: The Vendor Will Implement The System For You.**

Most vendors are in business to develop and sell a product. Few are organized structurally or financially to attract and maintain appropriate support staff for all their installations. Those that have larger staffs charge from \$60 to \$120 per hour for implementation services above a typically small number of "free" hours.

The implementation process can be an outstanding forum for users to learn and become comfortable with the system, experiment with it, and identify improvements and simplifications during the less threatening period before the system becomes "live." Involving users early in the implementation process typically permits staff to develop a positive attitude and success mentality regarding the change. Because a company usually can control the time of its staff better than it can control the vendors' staff, the user/vendor implementation team approach insures more successful implementations within the required time frame.

## **Myth No. 4: If The Package Doesn't Fit, Modify It.**

Nothing in life is perfect, especially application software: Application software is typically much less expensive than custom developed software and almost always can be implemented in a much shorter time frame than a custom system. The 20 to 40 percent concession you must make on certain nice-to-have features that would be available in a custom system is more than offset by the cost, convenience, ongoing vendor support, and reliability advantages of the application package.

I usually tell clients, "If you feel the urge to modify a package, lie down...until that feeling goes away!" Most vendors will not warrant or support their package if you modify it. In addition, all future vendor enhancements and releases must be again modified and tested by you to keep your system current.

If you must modify, use an approach that will not compromise or corrupt the integrity of the application package. Either develop programs that process files after the application package is through processing them, or work with preprocessors, i.e., programs that process data before the data is entered into the application package.

## **Myth No. 5: Since The Package Is Already Written Nothing Can Go Wrong...Go Wrong...Go Wrong...**

Application packages are traditionally designed to meet requirements of many companies within a particular industry or application area. Accordingly, they are developed using a series of parameters, codes, switches, and tables which are initialized at the beginning of an installation for your particular firm. This initialization process represents a tailoring or "customizing" of the system for your specific client environment. Such parameters can include:

- Report formats
- Audit trails
- Validation rules
- Reporting responsibilities and other relationships
- Classification schemes
- Module integration requirements
- Processing sequences
- Security
- Backup procedures

In addition, every computer system is part of a larger firm system that includes policies, procedures, people, and company objectives. An application package that works in one law firm company environment may not work properly or well in another. Furthermore, putting up your new files is a major effort that can introduce many errors into the new system. New procedures manuals may have to be written which integrate the new applications with the functions that take place before data is captured/entered into the system and discusses how the information generated by the system should be used.

**Myth No. 6: Because The System Is Used At Dozens Of Other Locations, A Systems Test Is Not Required.**

This is one of the most frightening myths because it appears very sound on the surface. Often a user will select a system on the basis of a vendor demonstration and viewing the application at a live reference site. However, as noted above, once all the system's codes, tables and parameters have been set, and once we consider the other system elements (people, policies, procedures and objectives), the application is unique. An appropriate systems test is needed to check and ensure that: the system is operating as the users expect, and, the users are operating as the system expects.

Communications regarding systems functions and capabilities are frequently misunderstood by vendors and users. It is only during a rigorous test, with carefully planned test data and results that "flex the system", that users will appreciate the nuances and functionality of the system (i.e. how a negative number in inventory quantity affects a turnover ratio, etc.).

**Myth No. 7: Putting Your Files On The New System Is A Snap.**

All firms have a significant amount of data to be entered into the new system before it is ready for use. Such things include client, inventory, and vendor records; charts of accounts and account balances; and other items unique to your firm.

Putting up your new files (called "converting") is a time consuming task that must be planned and executed very carefully and quickly. Appropriate cut-offs, reconciliations, and balancing routines are necessary to insure all data is entered accurately, completely and in synchronization with other related data.

This is the time to analyze your inventory, client, and account coding/numbering system to insure that they provide the computer

with the ability to give you the reports and analyses you need. Correcting a bad numbering system later will take great effort at best, or may never be corrected at worst—and limit the value of your system.

Schedule overtime and part-time help, if necessary, to get the data in quickly. If you don't, it may take months to learn whether the system can or cannot do what you want. Every weekly delay reduces your chances of getting a no-charge resolution.

**Myth No. 8: An Acceptance Test Is Not Needed Once A Systems Test Has Been Performed With Vendor Data.**

Vendor data typically is developed to show a system in its best light including how quickly a system responds to inquiries. Once all the parameters are set up, it is critical for users to develop their own acceptance test to ensure that all key features of the system are operating as anticipated. The purpose of this test is not to say that the system is fine...but to find any problems or bugs in the system before going live with production and before fully paying the vendor.

**Myth No. 9: Vendor Training Is Of Limited Benefit.**

Many firms wrongfully assume that people who have experience with accounts receivable or general ledger systems on a manual basis, or on a previous automated system, can automatically bring those talents into using, controlling, and managing a new system without additional or specialized training. Others believe that the documentation provided by the vendor will supply all the training that is necessary.

My experience shows that training is a critical factor, required to allow individuals to learn and experiment with the system in a supportive environment where questions can be asked and mistakes can be made. The confidence and team building developed during training sessions, as well as the relationship developed between the user and the vendor, can be critical to the ongoing success of the installation. In addition, most users' manuals and documentation are developed for reference purposes and not as a substitute for training.

You should keep several concepts in mind when scheduling and planning your training:

- Make sure everyone who needs training gets it. This will prevent having to pay extra later. More importantly, this can stop untrained users from making mistakes and "bad-mouthing" the system to everyone else.
- Try to have the training off-site (preferably at the vendor's site). This should, hopefully, stop everyday business disruption and allow personnel to really concentrate on learning the new system. If you must conduct training in your office, hold all phone calls and minimize disruption.
- Don't let the trainer leave your site until the training is satisfactorily completed. You've paid for it and are entitled to a complete and competent job.
- Perform the training in phases. It is difficult for people to learn everything in one

concentrated period. By having one session now and a second one in, say, 30 days, your people can accommodate questions, and bad habits can be corrected before they are too deeply ingrained.

Each of these myths is a C-Serpent, and not merely a bug that can be swatted away. Belief in these myths can result in huge time and dollar overruns, and disappointing results. If these myths are understood and dealt with effectively, there is no reason why an otherwise properly selected system should not go "live" successfully.

Knowing where the C-Serpents lurk and learning how to spot them will help protect any firm swimming in the ocean of new systems. "Just when you thought it was safe to go into the water again...come in. The water's fine!"



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