

7 Techniques to Ensure Your PV Implementation Succeeds



Introduction

Implementing a new PV system, a daunting task, can be accomplished with more confidence when you know what seasoned experts do to prepare the process for their projects. Since success is imperative, it's essential to start with a strategy that's inclusive and a plan that's comprehensive. In this advisory article, we share insights drawn from our years of firsthand experience. With the following points in mind, you can be confident that your understanding of this process, and the areas that are truly most important, will enable your team to form up, perform, and deliver success, more smoothly with minimal disruption to your operations.

1

Concentrate on Assembling Accurate and Inclusive System Requirements

Take the time to ensure that the organization understands the key requirements before implementing a new PV system. Once this is done, the essential work of prioritizing can proceed.

Having the organization's system requirements nailed down before the project starts is one of the first keys to success in implementing a PV system. When requirements aren't defined properly upfront, this will cause more effort, time, and cost than originally budgeted. Moreover, the system won't meet the requirements causing key functionality gaps or additional releases required.

We know that one of the chief culprits in derailing an implementation is scope creep (expanding requirements and objectives to the point that the project becomes an unmanageable mess). This is an inherent - and expensive - risk in any implementation. Scope creep can be prevented - or, at least mitigated - when your software deployment strategy includes configuring and personalizing all the system's capabilities and features at once. By sticking to the plan, you can stay on track and put the essential components of your new system to their intended use. This really helps you to disregard the bells and whistles that too often cause people to lose focus on their priorities.¹

2

Define Project Team and their Responsibilities Carefully

PV implementations succeed when project team members are properly chosen, and their responsibilities are clearly delineated and documented.

It is crucial to include the appropriate professionals on the software implementation team. Selecting the best qualified individuals for the team greatly enhances the odds for success. One of the most common reasons for choosing the wrong people is underestimating the project's complexity - which enables team members to become overwhelmed or swamped by the project while they attempt to learn on the fly (while still working their day job).

Staff assigned to the implementation team need to be provided the time required to manage their aspect of the project. Likewise, it's important to ensure their previous responsibilities (which may have been assigned to others) are being properly managed.

It is imperative to assign specific responsibilities to each team member. Everyone on the team needs to know who will be chiefly responsible for each workstream or key activity. The following are examples of a few of the typical activities. It is important to note that there are usually many others.

- The configuration
- Leading the training
- Overseeing the entire project (Keep in mind that there can only be one program/project manager)
- Managing the day-to-day activities on the project
- Evaluating the results of the implementation

3

Ensure the Accuracy of the Data Migration Plan from the Legacy System

An effective data migration plan ensures your data is accurate and thorough during the critical transfer phase from the source platform to the destination platform.

Once your team is assembled, it is crucial that they focus first on mapping, selecting, preparing, extracting, transforming, and transferring to the new system data that's of the proper form and quality. The team must focus on creating a thorough plan for data migration that factors in appropriate compliance requirements and corporate regulations.

The 7 Guarantors of a Successful Data Migration Plan:

1. Identify the **format** of the data and its location and sensitivity.
2. Identify the **resources** both internal and external needed to perform the migration.
3. Develop a **map** document that takes you from source to destination with needed transformations.
4. Plan the size and **scope** of the project and communicate to main stakeholders.
5. **Back up** your data in case you face the need to roll the process back and try again.
6. **Engage** the necessary resources both internal and external to execute your data migration plan.
7. **Test** and **validate** the new system to make sure it has no connectivity gaps.²

4

Map Integration Points and End-to-End Flow Completely

Integration mapping enables you to both execute and document your project step-by-step.

Effective system integration requires a thorough audit of all the parts to be joined in one interconnected infrastructure. Since this aspect of the process is typically fraught with oversights, neglected, and forgotten elements, it is essential that the team members conducting this phase of the project possess firsthand experience with the various touchpoints and data streams (by process, source, pathway, and destination).

Documenting the organization's physical connections and data flow also provides a valuable opportunity to review and analyze the logic of each connection. A best practice, whenever you must connect three or more systems and your project involves multiple use cases with interdependencies, is to create an integration map.

When connecting three or more systems, an integration map will ensure that you've identified the full extent of physical and logical connections. This will substantially increase confidence in both the newly integrated system and data normalization.⁴

Once all parts (software and hardware components) are integrated and working as a whole you can expect the organization to enjoy these specific benefits:

- **Increased Productivity** – When the systems are integrated, control can be consolidated over the daily activities. This, in turn, facilitates efficiency of the entire workflow: Employees can access all applications and all the data they require from one entry point.
- **Increased Data Accuracy and Trustworthiness** – With data now able to be updated across all parts of the system simultaneously, all departments can see the same data contemporaneously.
- **Accelerated Decision-Making** – Siloed data stored across multiple locations is eliminated. This allows the organization to perform analytics without the need to manually download and export data to a centralized repository. This holistic view of all information enables the organization to extract valuable insights that can simultaneously inform and accelerate enhanced decision making.
- **Reduced Costs** – System integration, when done well, typically costs less than replacing disjointed parts with a new system. Moreover, it also mitigates the operational challenges and procedural disruptions inherent in implementing an entirely new computer infrastructure.³

5

Create Comprehensive Testing Data and Cases

Developing a complete set of test data and test cases are critical to a successful implementation.

A test case (specifically identified data for this use) is a set of actions performed on a system to determine if it satisfies software requirements and functions correctly. Some data may be used in a confirmatory way, typically to verify that a given set of input to a given function produces some expected result. Preparing test cases and data will not only help you with the implementation but can also prevent many problems with data migration. Remember: if your business is unique – so is your data.

When writing test cases it is important that they are intended to test a basic variable or a task. This allows a software tester more flexibility in how to test code and features.

There are different types of test cases designed to document the system's ability to handle the organization's requirements before going live: ⁵

- System functionality. For example: Does the field accommodate 20 characters?
- System security. For example: Are password rules working?
- System usability. For example: Are links working properly?

6

Develop Effective Training. Conduct it Early

Employee participation in training--prior to go-live--is critical to enhancing the comfort level and realizing the full benefit of a new software system.

Software training is most effective when it is focused on the end-user position. Too frequently, businesses launch newly configured software applications without providing end-users the training they need to feel comfortable with changing their patterns of behavior. Training will succeed more reliably when personnel are made aware of the procedures specific to their position before it's time to begin using the new PV system.

Within the new application environment, each role will differ so specific training should be created for each unique role. Absent specific training for each role, the likelihood of improper use of the PV system increases and can pervade the organization. This can lead to a disastrous loss of productivity and mistakes that significantly debilitate an organization.

We have seen, in multiple instances, that training is treated as an afterthought and lacks the planning that could have prevented widespread disruptions and frustrations with newly installed systems. It is one of the most prevalent culprits in troubled system implementations.

A "train-the-trainer" strategy can be an excellent way to rapidly accomplish adoption of the new system. By leveraging your project team and "super users" to instruct the other users, people familiar with the organizational culture are enabled to lead change among peers.

Where this approach is not preferred, end-users can be encouraged to access documentation and/or video training offered by the software publisher. Providing a combination of these methods ensures that user training preferences are accommodated.⁶

Regardless of the path your organization chooses, the scheduling of the training, the subject matter, the duration, and the audience are all essential elements that must be considered in planning for a successful training program.

7

Best Practices for Launch

It's important to have an introduction ("kick-off" or "launch") meeting before training begins.

It is imperative to inform the team regarding the changes organizations new system will bring and the benefits to the organization. Moreover, making a public announcement when the final decision is made is also important. The most effective introductory meetings include:

- Explaining the benefits of this new system
- Presenting the onboarding program and anticipated timeframe.
- Inviting everyone to use the new software and providing an overview.

Many software vendors have an onboarding program, in which they teach you how to maximize benefits of their system and assist you with the first steps. The investment in third-party training is wise - especially when considering the higher expenses resulting from system misuse.

It is not unusual for teams to become overwhelmed by all the new information a new PV system provides. It's important to phase-in the details of the system over a previously defined interval, rather than all at once. The onboarding process should be planned for introduction across multiple stages that divide the information into easily understandable emails, guides and meetings. Bringing in an outside expert with specific experience in PV system implementation can be a cost-effective approach to training that saves time and facilitates uptake of information across the organization.

How Astrix Helps PV Implementations to Succeed

Unlike our clients' team, tasked with managing the selection and implementation of a new PV system in addition to their day job, Astrix provides these services every day. We bring dedicated experience in areas that, frankly, many companies find overwhelming to do well while maintaining operational excellence. What distinguishes Astrix is our quarter-century of assisting life science companies with enterprise-wide scope and complexity of their projects. We ensure that third-party software works the way our clients' need - specific to their unique organization, timeframe, and culture.

Unlike PV System vendors, who look to get the project done as quickly as possible as a key to make their margins, recognize license revenue, and move on to the next project, Astrix is different because we focus on ensuring each software implementation is customized to succeed.

While every company wants the vendors "A-team" to do their implementation and the vendor may indicate you have fully qualified individuals, this is not always the case. Many companies find that they need to invest significant time to review what the vendor does and in a sense is acting as the testing team for the vendor. This not only causes frustration for the client team members but also takes them away from their normal and required work.

Astrix assists by:

- **Providing Industry Experts** who, during system selection, can ensure the selected system meets your organization's defined requirements including business, data migration, reporting (and other factors you consider essential). This client-centric focus helps ensure that your team members' time is optimized when reviewing the system. On average, companies implement new systems every 7 – 10 years. Most clients don't have a lot of experience with these types of projects. Astrix provides professionals who bring the experience from numerous implementations, as well as deep industry and application expertise.
- **Providing Program Managers** that have led large scale implementations that include multiple products and multiple workstreams. Their experience will be invaluable to identify risks early (hopefully before they occur) and identifying the root cause and solution. Astrix PMs work with your leadership, the vendor, and any other key members to make sure that your project succeeds to your specifications, timeline, and budget.
- **Providing Project Managers** that not only ensure the project plan is complete and realistic but also that the vendor project management is properly managing their team. Astrix PMs work closely with the client project leadership and/or project manager.

Astrix's Pharmacovigilance staff has many years of experience assisting organizations in managing their implementations. We can provide experienced project leaders to assist in ensuring your project remains on schedule and meets the organization's requirements. Moreover, we can support your business in developing the proper test data and scenarios to ensure the system will operate as required when you go live, along with ensuring the data migration and integration is completed according to the demands of the business.

References

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