

# Doom or Bloom

Lessons learned from two  
HR/Financial System  
implementations

Andy Piper  
Director of Personnel & Compliance  
Northern Suburban Special Education  
District  
[apiper@nssed.org](mailto:apiper@nssed.org)

“The only sustainable competitive advantage is an organization's ability to learn faster than the competition.”

– [Peter M. Senge](#)



# Two Processes/Two Reactions

What people were saying/thinking/feeling during and after the first implementation:

- Antagonistic
- Who are you to tell me what to do?
- Threatening?
- Tense
- Frustrating
- Depressing
- Horrible environment to be in

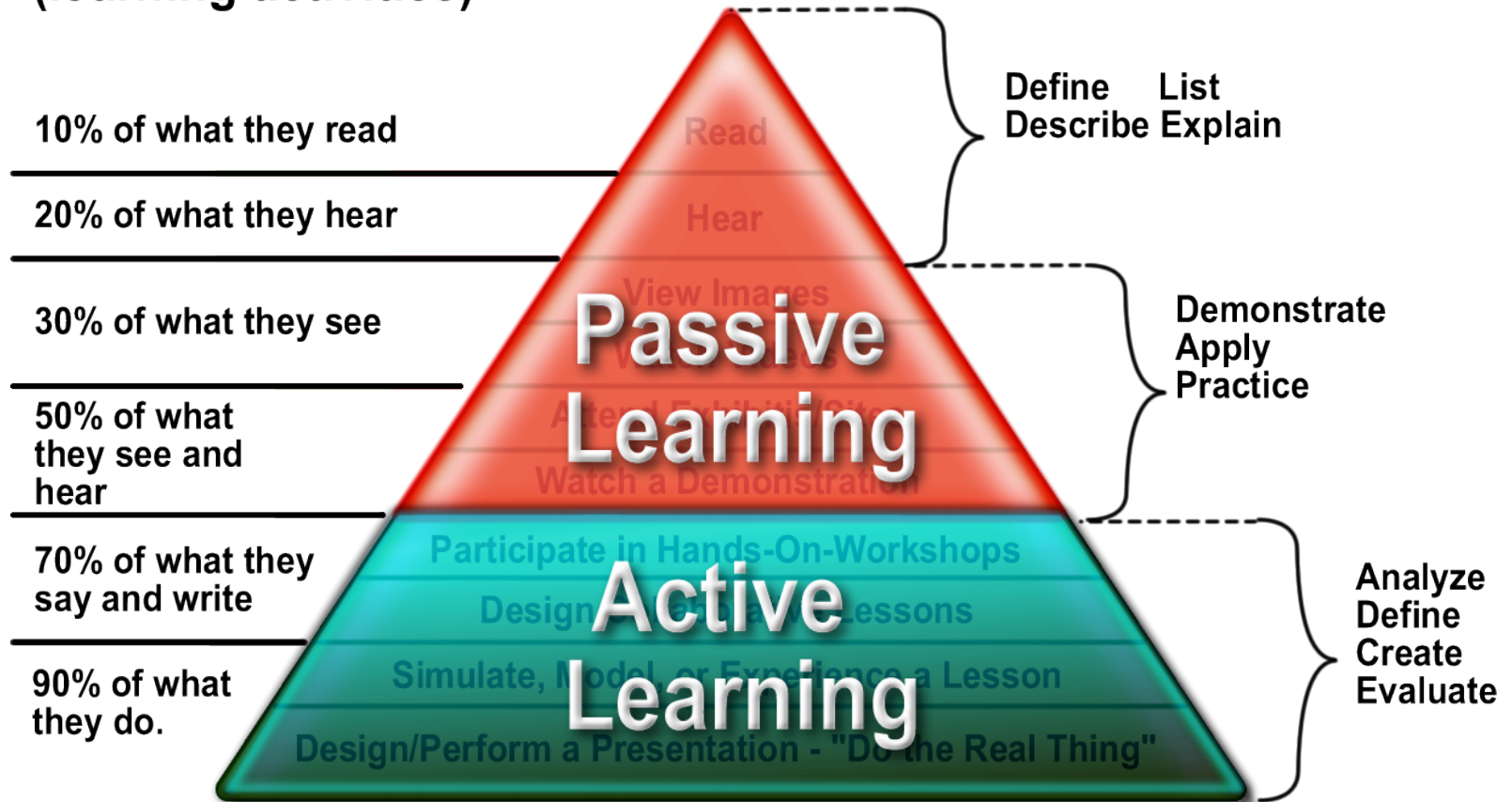
What people were saying/thinking/feeling during and after the second implementation:

- Team effort
- Inclusive
- Collaborative
- Understanding
- The wedge is gone
- Easier to come to work
- Hard work, but rewarding
- Improving

# What we learned...

**People generally remember...  
(learning activities)**

**People are able to...  
(learning outcomes)**



# Administrative Support

- Identify the key Administrators
- Be honest about process (what are implications – everyone’s thinking it)  
<http://vimeo.com/54739845?from=outro-local>
- Facilitation is very important
  - You will have to make decisions – be present and be involved!
  - Conflict will occur – be prepared to address.
- This will be noticed and remembered.

# Involvement

- Inclusion of all staff in the process at the exploration stage helps with buy-in and understanding
- Start with the end in mind (what are your key outputs and work backward – PD and Guskey).
- Be wary of the sacred cows! (This is the way we do things around here.) This process will help you find them.
- Pause in your work to make sure those who need to be included, are.

# Plan for Possible Barriers

- **This starts with assessing your environment**
  - Who is involved, who is willing, who is resistant?
  - Do you have the human resources necessary to successfully meet goals?
  - Do you have the technical and material resources necessary?
- **Have a process in place for working through these barriers. How will you manage conflict?**
- **Do you have competing initiatives or innovations that will impact this process?**

# Think - Pair - Share

- Think of the barriers to successful implementation or practice that exist in your organization.
- Pair with your neighbor(s) and discuss. What are they? Why do you think they exist? What have you or others done to reduce or eliminate them?

**Sage Advice Time!**



# Budget Time for Implementation

- This will not be easy.
- Time is required.
- Thinking is required (lots of it).
- Human Capital is required (your staff and you still have full time jobs).
- Short change this part at your own risk!
  - Having a vendor that is willing to come in and get to know your process first is very helpful and helps with buy in (recognizes the work).

# Analyze Jobs

- Internal or external (can find consultants who will do this)
- Consider this as if you are starting over, what qualities in staff would you look for, what experience, what skills?
- This does not necessarily mean you will be reducing or changing staff.
- What do you value most? Output (the work) or a Job Well Done (the process)?

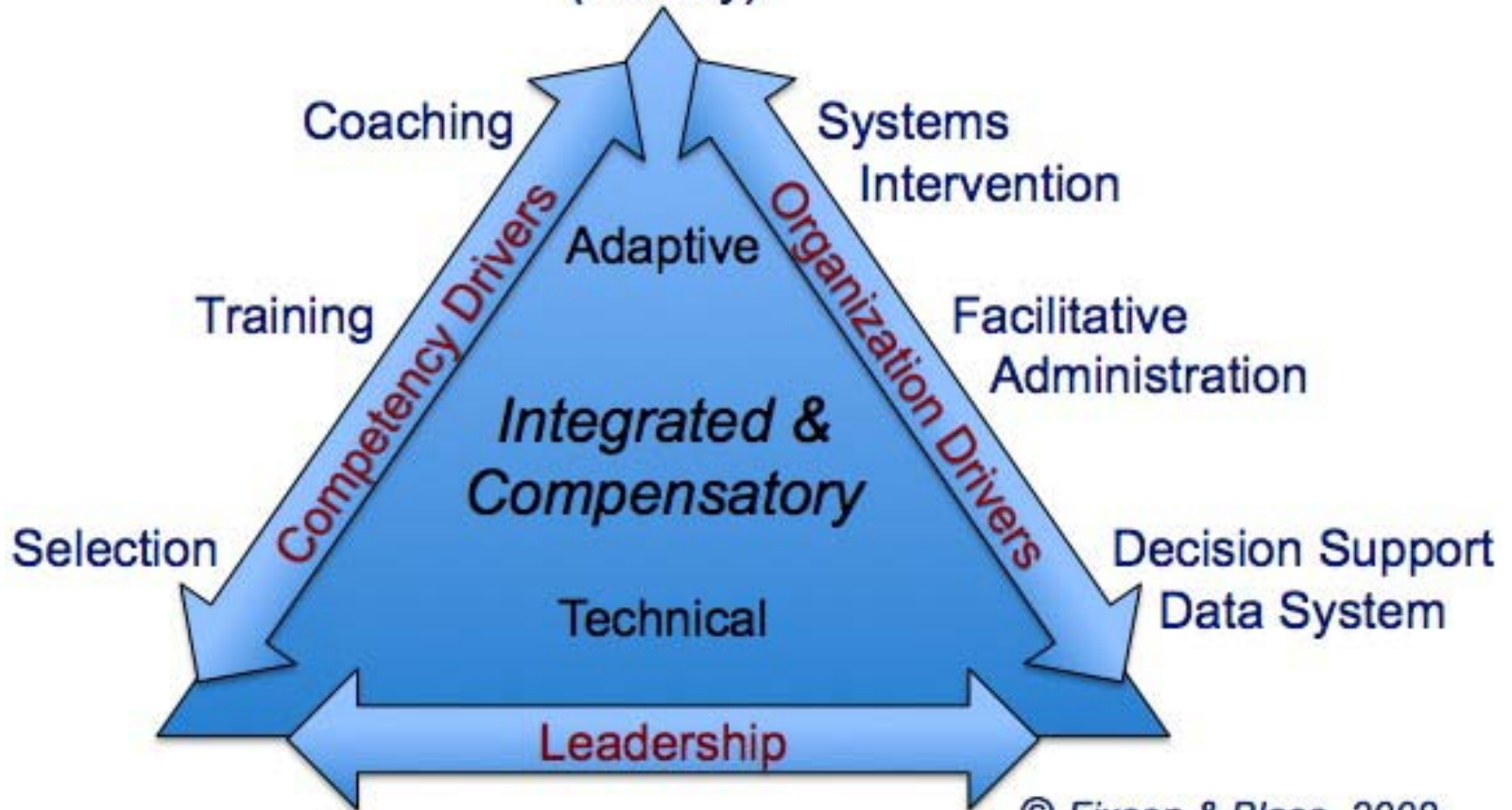
# Implementation Process

- **Identify Values, non-negotiables (are there things in your process you will not let go, why?)**
- **Your vendor will have a process in mind. It will likely be heavily focused on installation.**
- **Look to implementation research to consider the fit with your organization's values and plan for sustainability.**

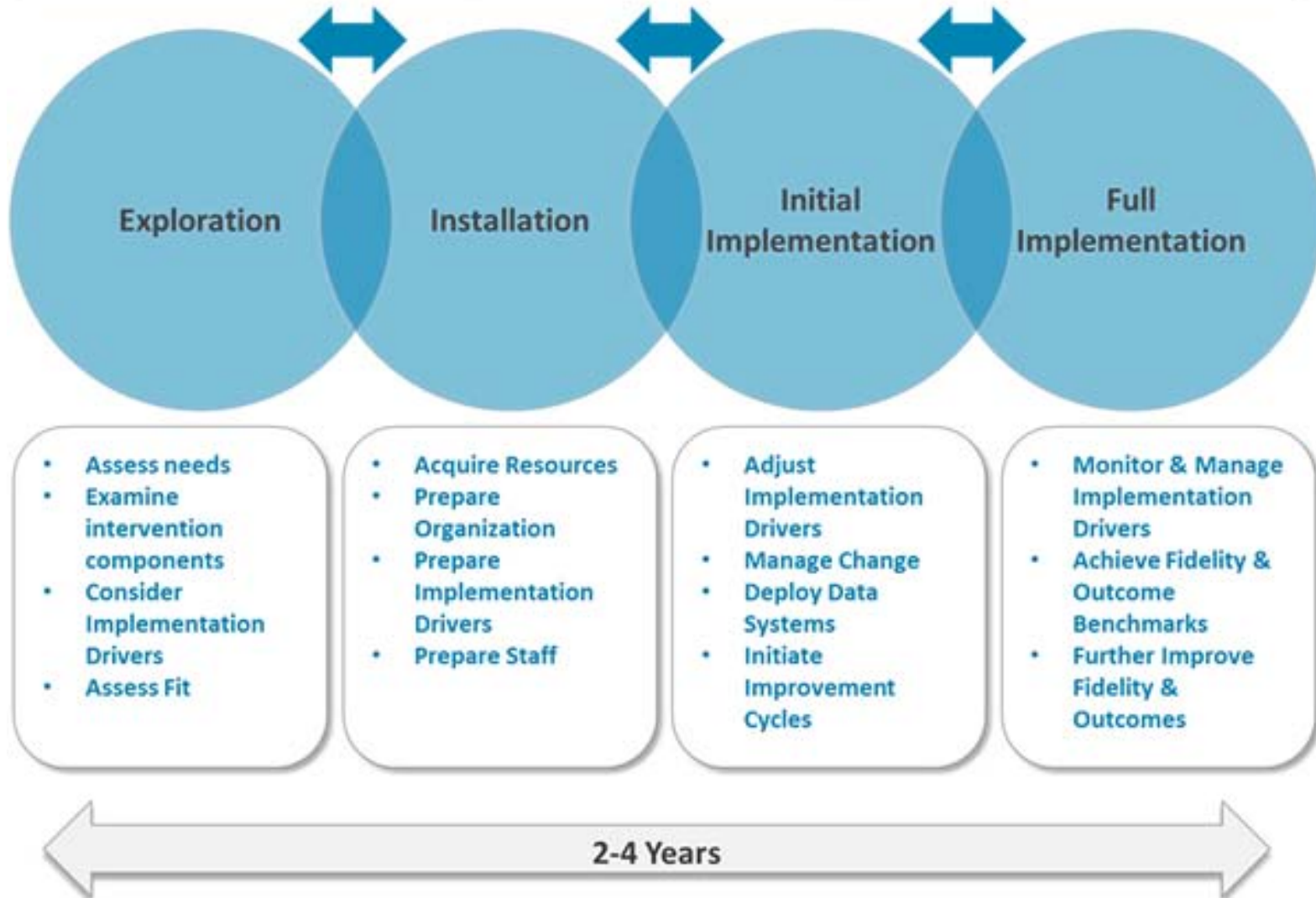
# Student Benefits



Performance Assessment  
(Fidelity)



## Implementation Stages



## Discovery

- Project Planning
- Business Process Analysis
- E2EO Training
- Workflow & Systems Gap Analysis
- Workflow Re-engineering
- Configuration Training
- Build a Test Plan

## Configuration Meditrac

- Reference Codes
- Benefit Plans
- Groups
- Letters / Reports
- Data Conversion

## Uniflow

- Workgroups
- Workflows

## Perfect Claim

- Business Rules
- Explanations
- Modular Testing

## Preparation

- Business Process Re-Engineering
- Revise Operational Policies & Procedures
- Define Deployment Plan
- User Training
- Parallel Unit Testing

## Transition

- Acceptance Testing
- Technical Assessment
- Go-Live Assessment
- Final Data Conversion
- Production Cut-Over

GO LIVE

## Stabilization

- Track & Manage Issues
- Proof & Refine Workflows
- Monitor Operations
- Publish Revised Policy and Procedures
- Report Production Metrics

# Think - Pair - Share

- Think of a successful implementation process you have participated in or lead.
- Share with your partner strategies that were utilized that contributed to success.

**Sage Advice Time!**

# Process Mapping (Business Process Overview)

- **What does workflow look like in your organization?**
- **What systems do you currently use to get the work done?**
- **How many people/processes intersect to get work done?**
- **This helps to involve your stakeholders in very meaningful work. This helps set the future/vision of what you want to accomplish.**



# Process Requirements

- Deeper analysis of how work will get done
- System process vs. organizational process
  - All HR & Financial systems work, yet none will work exactly how you want them to.
  - Consider how the new system “thinks” and either align your thinking with it (process) or decide you like your thinking better and plan for a work around/ a work through/customization.
  - Beware of the customization of a system – may reduce efficiency.
- Understand system layers and try to leverage to maximum impact (i.e., bang for your buck)
- Consider how to deal with exceptions to process.

# Identify and Understand Data

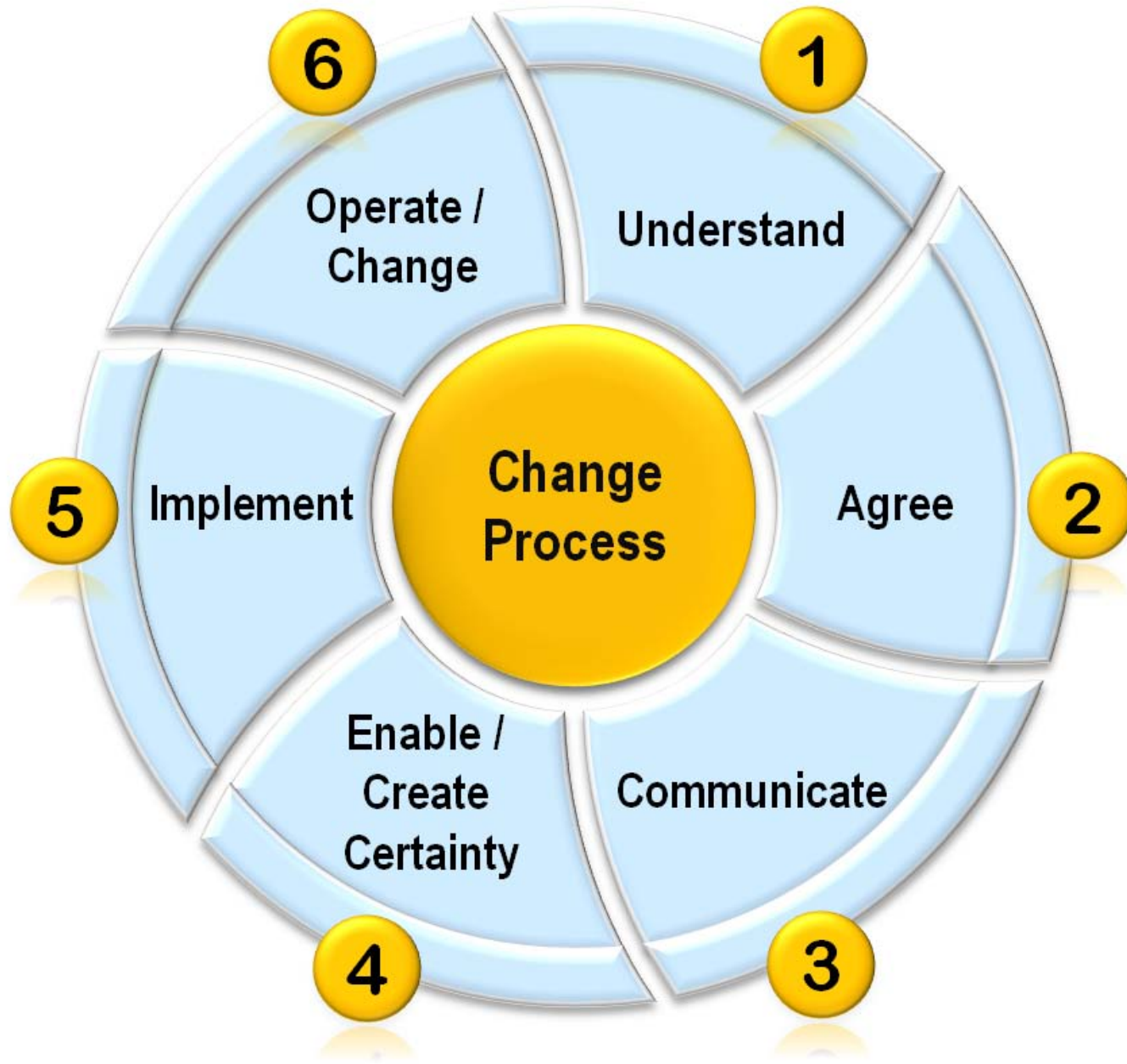
- Identify all the data that is maintained and tracked in HR and Finance
- Identify the stakeholders that have an interest or use for the data
- How many different systems manage the data before implementation?
- What data would you like the new system to manage?
- HR and Finance Data is different – acknowledge.

# Change Process

- Change will occur.
- Communication Keys: Candor (desired) – bailing (not good – the rumor mill) – bruising (not good – shuts down participation)
- Ensure follow up and create opportunities for ongoing discussion/problem-solving/sharing of concerns

**“People don't resist change. They resist being changed.”**

– [Peter M. Senge](#)



# Advice or Questions



“A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves.”

Lao Tzu

# References

*Matwichuk, Diana.* [Top Ten Success Factors for HRIS Implementations](http://www.hrvoice.org/top-ten-success-factors-for-hris-implementations/)  
Retrieved December 1, 2014 from <http://www.hrvoice.org/top-ten-success-factors-for-hris-implementations/>

Grimmer, A. Best Practices: Payroll/HRIS System Selection and Implementation  
Retrieved January 20, 2015 from <http://gocentripetal.com/best-practices-payrollhris-system-selection-and-implementation/>

Guskey, T. Planning professional development backwards. Retrieved January 20, 2015 from <http://www.schoolleadership20.com/forum/topics/thomas-guskey-on-planning-professional-development-backwards>

National Institute on Implementation Research:  
<http://nirn.fpg.unc.edu/learn-implementation/implementation-drivers/facilitative-administration>