7 STEPS TO A SUCCESSFUL IMPLEMENTATION ©

George Matyjewicz

Whether you are trying to implement an information system, a new advertising or marketing campaign, a new production line, office procedures, or anything else, you need to organize your process in order to be successful. It is my belief that a standardized implementation process can be, and should be used.

I originally wrote **"7 Steps to a Successful Implementation"** in 1992, after using the process for more than 20 years in implementing computer systems. Folks suggested it be called "7 Steps to a Successful **Computer** Implementation," but I disagreed. Whether you are trying to implement an information system, a new advertising or marketing campaign, a new production line, office procedures, or anything else, you need to organize your process in order to be successful. It is my belief that a standardized implementation process can be, and should be, used.

With any process, there are at least two parties involved - those designing the process and those who must carry out the process. A successful implementation must assure that all parties have a clear cut path to follow, so priorities and responsibilities can be assigned and monitored.

Let's assume we are implementing a marketing or advertising campaign. The agency just completed a research program and is developing a new campaign to include marketing collateral, trade journal advertisements, radio and television advertisements, direct mail and World Wide Web promotions. Let's identify the implementation and the scope of participation of each party.

A. SCOPE OF THE AGENCY'S PARTICIPATION:

Using a workbook, like our copyrighted **"7 Steps to a Successful Implementation ©"** workbook, the agency, together with their business partners will work with the client's management and staff throughout all phases of the project. The seven steps include:

1. Needs Analysis:

Meet with the client's management and staff to determine exactly what is needed to implement a new campaign. A lot of questions should be asked, and the client should be challenged as to why they are doing a particular function, if it doesn't make sense (or cents). The client's management and staff participation is critical to ensure the success of the project.

2. System Design Review:

Here you review what has been done in the past, and how the new campaign will be   used, when, and by whom. Procedures and presentations now in use may need to be changed, or you may need to design an interface from the new campaign to an existing process.

With any of these alternatives, it is important for management to understand what the campaign consists of and how it will function within the client's organization. Therefore the systems design review phase is considered to be the most critical part of the project. It must be thorough and complete, providing an extensive understanding by the client of what the package provides, and by the agency of how it is to be used in the organization.

3. Implementation Meeting:

In an implementation meeting, the agency meets with the client's management and staff to determine what has to be done, by whom and when. Present at the implementation meeting should be anybody who has a part in implementing the new campaign, i.e., sales management and staff, administrative folks responsible for controlling the campaign, marketing staff, product or service managers, and anybody else who will benefit from the campaign.

The meeting should be 2 - 4 hours in length. The goal of the meeting is to get a buy-in from all parties, and to be able to prepare an implementation plan (see Sample Implementation Plan), which outlines all the steps necessary to successfully implement the program. This plan becomes the guide for project management of the campaign. Management and staff participation is critical to the success of the project.

4. Implementation:

Next comes the physical implementation, i.e., collateral pieces, advertisements, direct mail, etc. and the testing to be certain the campaign will fit in the client's organization.

5. Testing Procedures:

The agency and the client must establish suitable test data which will test for all possible conditions and for the detection of all possible errors in the campaign. Our recommended testing procedures includes:

a. Obtain data from the sales force as to who they approach, how, and what results are expected. You must account for as many different combinations as possible. Ten to twelve cases should suffice.

b. Record the existing procedure and expected results in a step-by-step format, and the left side of a page.

c. On the right side of the pad, record the new campaign and how it replaces, supplements or does not affect the existing process.

d. Test the new campaign on either an existing account, or a similar account as one that was visited with the old process.

e. Record the results of the new campaign, and adjust the procedures and campaign as necessary.

It is important to record the results in order to obtain a visual impact and to determine a measurement to be used to judge the effectiveness of the campaign. Once the testing procedures have been satisfied, the campaign is deemed accepted and you can begin using the campaign, and measuring results.

This testing procedure would allow you to get your campaign up and running in the shortest time possible, while maintaining process integrity and guaranteeing adequate results.

6. Implementation Assistance:

During the implementation of the project, and the project roll outs at the various locations, the client needs assistance in preparing for the conversion to the new campaign, as follows:

a. Data Conversion:

If there are data files presently in use, will they work with this new campaign? Are new files or programs required? Will the client need special tools, computer programs, peripheral equipment, or anything else to implement this campaign effectively?

b. Forms and Supplies:

What will the sales force carry with them? What will the administrator need to record results? What kind of reporting will management receive to measure results?

Identify the forms and supplies that may be required in addition to the collateral being created. Who is going to create and maintain these forms?

c. Education:

Without education as to the intent of the campaign, and how it should be used, any campaign or project will fail!

To be successful, we recommend that management and key staff attend classroom education sessions, preferably at a location out of the client's office, in order to facilitate the implementation with minimum disruption.

The education should include:

    1) Executive or Management Overview:

    A brief (less than 1 hour) Executive Overview of the total campaign, and the expected results. This course should be given separately to management in order to effectuate an uninhibited discourse among the participants.

    2) Sales Managers/Campaign Coordinator:

    The Executive Overview course from above (given separately to this group).

    A 1-2 hour features and benefits course of how to use the campaign and what to expect if used properly.

3) Sales Staff:

A full day course designed to show the staff how to use the material, and what to expect from the campaign. Role playing is critical here, whereby the sales staff act as prospects and others use the campaign to pitch the prospect.

Note: The times stated may be more or less, depending on the extent of the campaign, the logistics of the client's offices, the capabilities of the client's staff, and other such factors.

d. Parallel Run:

Have some of the sales force use the new campaign, while others use the existing procedures. The old process should continue to be run for a sufficient period of time after implementation of the new campaign, to give management a basis of comparison to verify results. Should any problems arise, the agency should be prepared to adjust the campaign, or the client should implement procedures to resolve the problems.

Plan for a follow up meeting where those using the new campaign will tell their successes and offer comments for improvements. Be prepared to implement change to the program if warranted.

e. Go "Live":

Once you are satisfied that the parallel run works, go "live", which means eliminate the old process and use the new campaign.

7. Structured On-Going Support (S.O.S.):

To be effective, a new campaign must include a *Structured On-Going Support* program to assist those folks who are using the new campaign and who may have questions or need assistance. Part of a structured program should include at least the following:

- Campaign performance review
- In-the-field implementation assistance and review
- Structured, pro-active telephone support follow up

B. CLIENT'S PARTICIPATION AND RESPONSIBILITIES:

1. Identify Management and Staff:

You must determine who is going to physically implement this campaign - from the manager down to the administration person. You also need to determine whether or not temporary help or assistance from the agency is necessary.

To be successful, *ANY* implementation must include *MANAGEMENT INVOLVEMENT* as well as staff involvement, duties and responsibility to include:

a. Executive Level Manager:

The executive chosen as manager of your new marketing campaign should be familiar with the company's principles and practices. The executive should be respected in the company, able to enforce the disciplines required by, and know what to expect from, the campaign. The goal is to pick an individual who can get the campaign to work for the company and not vice versa. Typical candidates for this position include the V.P. of Marketing, V.P. of Sales, Practice Development Partner, and possibly a retired family member executive who may be called in to oversee this new campaign.

Time Requirements. During the implementation of the campaign, the executive should expect to spend 15 to 40 percent of his/her time involved in campaign management. After the first 60-90 days, this time should gradually decrease to roughly ten percent. Changes to the campaign will, of course, require extra time. **Management Requirements.** The executive level manager must be able to communicate effectively, understand the nature and interrelationships of the campaign, enforce the discipline on the staff, supervise the implementation and use of control procedures, ensure smooth and predictable data flow and ensure that proper campaign processes are enforced. The executive level manager is responsible for making decisions regarding costs or changes to the initial campaign.

In addition, the executive should confer regularly with the agency and report to company management on the progress of the implementation. In short, management at the executive level is responsible for overall control of the campaign.

b. Project Coordinator/Facilitator:

The project coordinator/facilitator is responsible for the day-to-day implementation and control of the campaign. This position does not require advertising or marketing skills, rather it requires logical, orderly work habits. Typical candidates for this position would include the sales administration manager, marketing coordinator, sales assistant, or a knowledgeable administrative assistant.

Time Requirements. During the implementation of the system, the project coordinator/facilitator should expect to spend 50 to 75 percent of his/her time involved in implementing and controlling a major campaign. After the first 60-90 days, this time should gradually decrease to roughly twenty-five percent. Changes to the campaign will, of course, require extra time.

Management Requirements. The project coordinator/facilitator must be able to communicate effectively, supervise daily and routine operations of the campaign, i.e., coordinating resources, managing the sequence and distribution of reports, answering questions about daily operations, consulting with the executive manager about operational or mechanical malfunctions and other such duties. Along with the executive level manager, the project coordinator/facilitator is responsible for controlling daily functions of the campaign.

2. Physical Planning:

a. Office:

Will this new campaign require any special office equipment, furniture, resource allocation, office changes, people changes, etc.? Be certain the requirements are identified and plans are included in the implementation schedule.

b. Location Rollout Schedule:

When, and how, will you roll out the new campaign to other locations? Who is responsible for the overall roll out and who is responsible at each location? A time table should be established, as follows:

Location	Planned Date	Resp. Mgr	Assn To	Rev. Date
_____	_____	___	___	____
_____	_____	___	___	____
_____	_____	___	___	____

3. Process Operation:

Once the new campaigns and processes are operational, it will be the client's responsibility to operate them in accordance with their established schedules and to assure that all programs and processes are working properly.

4. Training:

The client assumes responsibility that their management and staff will attend training sessions as outlined in the implementation plan. Those attending the training sessions will include sales staff, sales managers, sales assistance, marketing staff and anybody else involved with this campaign.

5. Staffing and Discipline:

The successful implementation of any project requires discipline within the client's organization. Turnover of staff prior to, and during the implementation, will cause the transition period from the old to the new system to be more difficult and costly. It could also result in additional fees, should it become necessary for members of the agency to familiarize the new individuals with the campaign or to make changes.

As a result, the client should make every effort to guarantee a smooth and continuous implementation by assigning qualified staff to the project who are knowledgeable in the in the operations of the client's business, and who will be involved throughout the scope of the project.

6. Extra Work Load and Overtime:

The implementation of a new system may require an extra work load on your staff and could result in overtime and extra staff costs.

It may pay to hire a temporary employee to process some of the functions, i.e., computer processing, administration functions, etc. Your staff should understand the process necessary to implement this new program, but there may not be any learning experience in the details of the implementation.

7. Internal Controls:

It is the client's responsibility to exercise all the internal control procedures required to ascertain that the new program is implemented and controlled properly. Internal control procedures must be exercised over such areas as market assessment, sales follow up, ad effectiveness, prospect database, etc.

About the Author. George Matyjewicz is a multi-faceted Senior Executive with expertise in business development, internal controls, marketing, sales, operations, finance/accounting, and information systems. He is Managing Partner at GAP Enterprises, LLC a management and marketing consulting firm based in New York.

He was formerly North American Marketing Manager and North American Manager of Consulting Services for a NYSE-listed, International information systems company and a principal/partner at one of the top 40 CPA/Consulting firms in the United States. He has brought 50+ new products/services to market in the last 10 years, and he spearheaded a unique "Differentiation Strategy" that allowed the firm to capture three $1 million+ deals, and enter new, highly-profitable market arena. Click here for details of his expertise.

SAMPLE IMPLEMENTATION PLAN

This is a *SAMPLE* implementation plan. Plans are always tailored to each specific client, and are developed after an implementation meeting with the client. Activities change, depending on the project. The implementation plan should also be sorted by due date and responsibility to monitor progress.

ACTIVITY	RESPONS-IBILITY	DUE DATE
1. Pre-Implementation: . Develop project team . . Define responsibilities of team members.	Client Client	01/15/xx 01/15/xx
2. Implementation Planning: . Implementation meeting . Assign tasks to project team . Develop implementation plan . Distribute implementation plan	Agency/Client Client Client/Agency Client	02/01/xx 02/01/xx 02/10/xx 02/12/xx
3. Testing: . Determine scope of testing . Obtain sample test cases . Record the existing process . Record proposed campaign . Plan the testing process . Test the new campaign . Review test results . Adjust the campaign	Client/Agency Client coor- dinated with Agency Client Client/Agency Client/Agency Client/Agency Client/Agency Agency	02/10/xx 02/10/xx 03/10/xx 03/10/xx 03/15/xx 05/31/xx 06/15/xx 08/15/xx

ACTIVITY	RESPONS-IBILITY	DUE DATE
4. Education: . Prepare executive overview . Prepare sales manager course.. ... . Prepare sales staff course . Schedule education classes	Agency/Client Agency/Client Agency/Client Agency/Client	03/10/xx 03/10/xx 03/10/xx 03/12/xx
5. Parallel Run: . Identify prospects for controlled process . Test campaign on prospects . Review results	Agency Agency/Client Agency/Client	06/15/xx 07/31/xx 08/15/xx
6. Roll Out Campaign to Other Offices: . Identify management and staff . Roll out to first region . Review progress . Roll out to all offices	Agency/Client Agency/Client Agency/Client Agency/Client	08/31/xx 08/31/xx 08/31/xx 10/31/xx

This last section will need a lot more detail, depending on how many offices and regions.