



CONSENTIA
MAKING KNOWLEDGE WORK.

Selecting New Technologies: Lessons Learned

By: Floyd Bjorgan

Background

I am frequently in discussions with companies and organizations of different sizes about document management or enterprise content management (ECM) systems. I've seen those organizations take many different approaches to seeking out an ECM system, and would like to share some of the lessons learned from those experiences, both the good and the bad! These lessons can be applied to the selection and implementation of almost any new enterprise technology.

Involve the IT Department Early

The IT department in some organizations are seen as a necessary evil. In other organizations they are viewed as key partners to the business. Regardless, the deployment of any enterprise system is going to need IT participation. Bringing them in early will help address issues such as: whether the system can be cloud based or must be on premise, who is going to support the system, who will do software installation, compatibility with other applications, and much more. To put it simply, getting IT involved early will make the whole technology selection and implementation process more effective. And if you start treating them like key business partners, they will probably start being key business partners - if they aren't already!

Focus on Needs

Before going too far down the path of choosing a technology, first determine what you need. What are the business problems you are facing? Who in your business has these problems and how big are they? If those problems are addressed what would be the monetary impact to the business? Imagine if you went shopping for a new vehicle without thinking about what you needed. How would you determine if you should buy a new 4 x 4 pickup or a used VW Beetle? Before you start car shopping you would normally have a good idea of what you need and your budget. By spending some time on the problems you have and the economic impact of solving them, you will start to build a business case for investing in a solution. When you start looking at different technologies, you will be able to quickly rule out some choices that do not meet your needs, or your budget. There are dozens of technology choices out there and they are not all alike. Anything that helps you narrow down your choices will make your life a lot easier.

Educate Yourself

There are a few ways you can educate yourself. A number of technology research firms monitor various technology spaces and publish their research, usually for a fee. This will help with narrowing down technology, but should not be treated as your only source of information. It will not fully address issues of local support, costs, or other items which would be very specific to your business. One pretty good way to get an education is to meet with a few vendors who appear to meet your needs. Good salespeople are actually consultants. They want to understand your needs and determine if they have the correct solution for you. Granted, their agenda is focused on their products and services, but they are still a good source of information. Another way, if you have the budget for it, is to pay a consultant with experience in the field. They can help with a needs assessment and determine the key requirements for a solution.

Change Management

When it comes time to deploy the new system I occasionally see members of the organization not understanding why this needs to be done, why they have to change, and even worried about their job security. It's important to be putting in place change management within the organization early on so that people know what is going to change and why. Doing it on the day users get their training on the new system is too late and may result in strong resistance, and ultimately even project failure. In its simplest form this can be accomplished by frequent two way communication.

Nominate a Champion

Identifying a business area or individual that is excited to adopt the new change will greatly help ease the transition to the new technology. I've found them understanding if you run into bumps in the road, willing to help in all phases of the project life cycle, and be an advocate for other areas resisting change.

Staged Rollout

For larger deployments, it is often very beneficial to deploy the new application as a pilot or proof of concept before going organization wide. A pilot will allow you to identify if requirements are met or missing, work out any kinks, and limit the amount of frustrated users if things take time to get right. Making a successful first impression goes a long way when introducing change to an organization. It can sometimes make or break user adoption of the new application.

Status Updates

If a severe issue does occur during the pilot or organization go-live, it's best to be transparent with the end users on the issue. Users need to be informed that the issue has been identified and resolved or is being worked on. In addition to issues, it's a good idea to keep the users informed on the project status. It doesn't have to be low level detail but more about when they have to be involved for requirements gathering, user acceptance testing, delays in the project, and so on. I've found keeping end users informed on the project status helps build a positive connection with the end users. You have to remember that what you are implementing could drastically affect the way they do their job. Building that rapport with the end users will make for easier user adoption.

About the Author – Floyd Bjorgan

Floyd Bjorgan is a professional engineer who has been leading software deployment businesses in the industrial automation and enterprise content management technology areas for over 25 years. He has personally worked with clients ranging from small businesses to major global corporations in North America, Europe, Australia, and Africa. Floyd is currently the president of Consentia Inc., but still oversees many of the company's enterprise content management projects.

About Consentia Inc.

Consentia has been helping Alberta businesses and government departments go paperless since 1971. Owned and operated by Albertans, we take great pride in the quality of our work and in our ability to provide turnkey solutions for document management, scanning, data entry, and transcription.

We have provided our products and services to:

- Municipal and Provincial Governments
- Universities and Research Companies
- Energy Utility Companies
- Oilfield Supply Companies
- Oil and Gas Producers
- Pipeline Companies
- Medical Professionals
- Professional Associations