Installation and Application of a Commercial IH Software Package

“What to Expect and Pitfalls to Avoid”
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Share Practical Implementation Experience

Full Project Life-Cycle

Need Recognition --> Product Selection --> Installation

Share what worked and did not work

Provide 3 tips for making your project a success
Background

- The Company
  - San Francisco Bay Area Biotech Company
  - ~6000 Employees World-wide
  - Biopharmaceutical, Vaccines and Diagnostics research and manufacture
  - All IH capability and resources in corporate office

- My role at the Company
  - Head of Industrial Hygiene and Occupational Health functions for 4 U.S. sites
Why Did We Start

- The Situation
  - ~20 disparate, homegrown applications
  - Technical support not available
  - Reporting was limited and time-consuming
  - Needed to spend less time with “OMPs” to get data to Sr. Management

*Less than 35% of Software Projects Succeed*

*The Standish Group 2004*
Product Selection

- Build vs. Buy

- Product Selection
  - Preceded actual project
  - Occurred in 2004 (“Blue Sky”)
  - Narrowed choice to 3 vendors

**Key Lesson Learned**

Expend the effort to evaluate needs vs. wants. Be able to judge the best product for your organization.
Project Initiation

- **Scope**
  - 3 phases (IH/OH, EMS, KPI)

- **Commitment**
  - Executive Management
  - Results tied to Bonuses

- **Schedule & Budget**

*Key Lesson Learned*

+ We defined the Commitment step very well
- Project budget and resource needs were defined in a vacuum
Project Steps

- Feasibility/Scope
- Business Requirements Definition
- Functional Requirements
- Development
- Training
- Testing
- Installation
- Go-Live!
- Support/Maintenance
Feasibility/Scope Definition

- Roles & Responsibilities defined
- Ownership
- How will the Organization’s IT department support the project?

Key Lesson Learned

- All Participants must be involved upfront
- Roles need to be communicated clearly (not just in a 50 page document)
The Players

- Outline the roles & responsibilities
  - Business Process Owner
  - Business Process Users
  - IM Project Manager
  - Developers/IM Technical Resources
  - Product Vendor

- Initial Missing Player
  - Integration Partner!

Key Lesson Learned
Business Process Owner needs to be involved at ALL stages
Do NOT underestimate the “translation” necessary between EH&S and IM
Business Requirements

- Standard vs. Customization
- Mapping of business processes
- Defining company-specific items
- Interfaces to other Systems
- Reporting requirements!!

Key Lesson Learned

DO NOT skimp on requirements – this is the foundation of the project!!
DO NOT forget reporting or leave it to the end
Training

- **Formal**
  - Vendor-supplied Training (Product Introduction)

- **Informal**
  - Writing and running test scripts
  - User Acceptance Testing

*Key Lesson Learned*

Training is NOT optional. Informal training can be used.
Installation & Go-Live

- Define contingency plans
  - New & Old run in tandem?

- (Re)Define Roles & Responsibilities
  - Who is going to be available
  - Weekend planning

- Team was present on site on Saturday and the test scripts were run to verify successful installation (we did this right!)

Key Lesson Learned
Create an implementation AND a fall-back plan.
Project Results

- Successfully deployed. Currently used. Met the functional goals.
- Took longer and cost more than originally forecast.
- Key decisions at the outset set the tone (for good and bad).

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3 Tips For Success

Tip 1 – Commitment of Management and the Project Team

Tip 2 – Map (and modify) your Business Processes & Requirements

Tip 3 – Commercial software packages do not come “Off the Shelf” and “Ready to Use”

The level of success can be tied to the degree of user involvement, executive management support, and having an experienced project manager, in that order. – InfoWorld Aug 2005

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