Eight Steps to Guarantee Success

Technical Support, Project Management, Program Management... Keeping it Simple

By Heather L. Pettit and Amy Ceraso
Why Eight Steps?

1. Every Organization is different
2. Every Project is different
3. Process needs to be simple
Where to use the Eight Steps?

- IT Helpdesk
- Software Development Life Cycle
- Infrastructure Management
- Project Management
What Are the Eight Steps?

1. What is the problem?
2. What are the requirements?
3. Define Solution and Expectations
4. Document the solution
5. Test and Verify Solution
6. Deliver solution
7. Validate Solution
8. Follow-up

8 STEPS TO SOLVE ANY IT PROBLEM
Putting Theory into Practice: Pennsylvania

- Orphans’ Court Project
- Original Records Project
- Interpreter Certification Program
Step One: What is the problem?

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Detail Error message/steps to reproduce.</td>
<td>Determine what the business is end goal is? Determine why their existing process does not meet their goal.</td>
<td>Are there errors being reported? What is the impact on the users?</td>
<td>Work with business to determine the root problem and symptoms, define each. Determine what the business end goal is? Determine why their existing process does not meet their goal.</td>
</tr>
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## Step One: Sample Tools

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Step One: Real World Examples

Orphan’s Court Project

✓ 67 Different, disparate systems
✓ Litigants being treated differently in different jurisdictions
✓ Divergent compliance with the Rules of Court
✓ Various E-filing Systems as opposed to single state-wide
Step One: Real World Examples

Original Records Project

✓ Bound, bundled or boxed records submitted to the appellate courts
✓ Manual Indexing and numbering of original records
✓ No way to communicate status during process
Step One: Real World Examples

 Interpreter Certification Program

✓ Requirement for AOPC to track Interpreter information
✓ Requirement for agencies and courts to register languages required for trials
✓ Requirement to provide list of qualified Interpreters and those requiring certification
### Step Two: What are the Requirements?

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<tr>
<td>What do the users need to do to complete their task?</td>
<td>What are they required to do in order to achieve their end goal? How is that different from what they are doing today?</td>
<td>New hardware? New updates? Configuration Changes? New software?</td>
<td>What are they required to do in order to achieve their end goal? How is that different from what they are doing today?</td>
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### Step Two: Sample Tools

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<tr>
<td>Helpdesk FAQ for all fixes or alternatives</td>
<td>Software Requirements</td>
<td>Support and Maintenance Agreements, Blogs, vendor sites</td>
<td>&quot;As Is&quot; business process flows, business/legislative requirements</td>
</tr>
</tbody>
</table>
Step Two: Real World Examples

Orphan’s Court Project

• Detailed System Requirements through JAD Sessions
  ✓ High level pre-defined Business Processes (Wills, Guardianship, Marriage, Birth Records, etc.
  ✓ Standard CMS Business workflow

• Detailed Technical Requirements
Step Two: Real World Examples

Original Records Project

• Pre-defined System requirements
  ✓ Requirement to reuse existing PACFile System
  ✓ Update Appellate CMS to integrate with new Technology

• Designed detailed workflow to show court, agencies, jurists and clerk’s office the impact of the new system
Step Two: Real World Examples

Interpreters Certification Program

• Pre-Defined System Requirements
  ✓ Requirement to access system from remote locations (internet-based)
  ✓ Broad security structure to allow for multiple user types

• New Business Process Work-flow
  ✓ Notifications system
  ✓ Reporting and Tracking
Step Three: Define Solution & Expectations

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<td>Can they do something different today, until a final solution is determined?</td>
<td>Develop the solution with the requirements and end goal in mind. Be mindful of the deficiencies of the existing solution. Work with the users.</td>
<td>Design solution long term/short term. Communicate Expectations including estimate time for resolution, timeframe for user impact.</td>
<td>What do they need to change to meet their goal? Do they need a new piece of technology or other resource?</td>
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### Step Three: Sample Tools

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<tr>
<td>Communicate with user estimated time for resolution</td>
<td>Software process map, GUI Proto-type</td>
<td>Communication Plan</td>
<td>&quot;To Be&quot; business process flows, Project Outcomes and Deliverables</td>
</tr>
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Step Three: Real World Examples

Orphan’s Court Project

• New CMS will be used by all Clerks of Orphans Court and Registers of Wills
• New CMS will include Document Management
• New CMS will include E-filing
• Legacy Data will be migrated to new CMS
Step Three: Real World Examples

Original Records Project

- Counties that are technically able develop the record will participate in the new workflow process, including notifications, uploading and updating CMS
- Counties not technically capable will have an alternative process created
Step Three: Real World Examples

Interpreters Certification Program

- Individuals or agencies must register with AOPC staff for certification
- System must track full certification process, and produce batch notifications
### Step Four: Document Solution

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<tr>
<td>Document steps</td>
<td>Document the workflow and design</td>
<td>Create change management</td>
<td>Document requirements and business process</td>
</tr>
<tr>
<td>taken to resolve</td>
<td>of the new solution with the users</td>
<td>including implementation and</td>
<td>changes in current business process</td>
</tr>
<tr>
<td>issue</td>
<td></td>
<td>fallback plan</td>
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- Document the workflow and design of the new solution with the users.
- Create change management including implementation and fallback plan.
- Document requirements and business process changes in current business process.
Step Four: Sample Tools

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<td>Document is Helpdesk System</td>
<td>User Test Scripts, Training</td>
<td>Change Management</td>
<td>User test scripts and training</td>
</tr>
<tr>
<td>how issue was resolved</td>
<td>Documentation</td>
<td></td>
<td>material</td>
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Step Four: Real World Examples

- Business Process Workflow Diagrams
- Iterative Approach: Prototype Screens
- System Requirements Document
- White Paper
- User Documentation
- Training materials
## Step Five: Test & Verify Solution

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<td>Test the solution will meet their requirements</td>
<td>Test and validate the solution against the requirements, goal and deficiencies</td>
<td>Test solution prior to implementing, validate expected results</td>
<td>Users validates new solution meets project objectives, business objectives, provides solution to defined problem</td>
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Step Five: Sample Tools

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<td>Test and validate solution will work with the</td>
<td>Deploy to QA Environment, Regression Testing, Testing Software</td>
<td>Test/QA Environment/Failover solutions</td>
<td>Regression testing, User Acceptance Testing</td>
</tr>
<tr>
<td>requirements provided</td>
<td></td>
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Step Five: Real World Examples

- Unit Testing
- Regression Testing
- Trainer Testing (training Material)
- User Acceptance Testing (business process workflow)
- Pilot testing
## Step Six: Deliver Solution

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<td>Provide solution to user</td>
<td>Deliver solution to users to validate the problem is solved and meets the requirements</td>
<td>Implement solution to least impact user population</td>
<td>Define implementation strategy with users, expectations and timelines</td>
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Step Six: Sample Tools

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<tr>
<td>Deploy to user system, Deskside support</td>
<td>Release Code Production Environment, Fall back plan if necessary</td>
<td>Implementation Plan, Change Management, Fall Back plan</td>
<td>Implementation, Communication and Fallback plan</td>
</tr>
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Step Six: Real World Examples

• Pre-Go live meetings to validate solution works with business process
• Pilot group testing
• “Soft” go-live with selected users
## Step Seven: Validate Resolution

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<tr>
<td>Verify they are able to do their tasks</td>
<td>Have users test to solution</td>
<td>Confirm solution worked and expected results are being achieved</td>
<td>Validated new solution is working as intended in &quot;production&quot; environment</td>
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**Step Seven: Sample Tools**

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<td>User validation issue is fixed</td>
<td>Deskside support, User Acceptance Test Scripts</td>
<td>User Validation Testing</td>
<td>User testing Post-production, validate expected results</td>
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Step Seven: Real World Examples

• Post Go-Live Support
  ✓ On site training up to two months
  ✓ Virtual training and support (WebEx and Phone)

• Training material and documentation
Step Eight: Follow-up!

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<td>Make sure they are happy with the solution.</td>
<td>Follow-up to make sure solution is acceptable to user, if problem is not solved, then repeat, steps 1-8.</td>
<td>Follow-up with users to verify issue is resolved.</td>
<td>Communicate with users after implementation to see if continued results are achieved.</td>
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<td>Follow-up to validate, Close ticket, update FAQ</td>
<td>Email, Close-out meeting, Update System Documentation, Update Training material, User Groups</td>
<td>Update Change Management Log, Update System Configuration Documents</td>
<td>1 Week follow-up, 2 week follow-up, 1 - 3 Months Project close and lessons learned, User Groups</td>
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Step Eight: Real World Examples

- User Alerts
  - System Enhancements
  - Changes in CMS
  - Changes in Rules of Court
- 24 X 7 Helpdesk Support
- Ticket Support System
- User Groups and Ongoing Training
Simple Right?

1. What is the problem?
2. What are the requirements?
3. Define Solution and Expectations
4. Document the solution
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Questions?

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