

Six Steps to Success

with your
iMIS Software

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Executive Summary

Begin with the end in mind.

That's one of the habits of highly effective people. And it's the approach that ISG Solutions takes with every project. In this case, "the end" is a smooth implementation of the *iMIS* association management software, so that every project comes in on time and on budget.

It's surprising how rare that is. The Standish Group has tracked information technology projects in detail since 1994. According to their 2001 report, only 28% of these projects succeeded, while 23% failed outright and 49% were "challenged." A project is considered challenged when it comes in over-budget, behind schedule and with fewer features than originally specified.

No association can afford that. That's why ISG's seasoned consultants always use our time-tested six-step process. These six steps embody the best practices our people have learned over the course of implementing many successful systems for associations like yours.

We're not saying it's easy. Nothing worthwhile is easy. In fact, with our approach, your people will work hard at the start of your project. The Design stage takes a lot of effort. This is when we work with you to visualize exactly how you want your system to look. But the effort tapers off as we coast through the Deployment stage.

Not all consulting firms work this way. Some may promise that they'll do all the heavy lifting, so your whole project will be easy. The reality is that a project designed that way may well start off easy, but get tougher and tougher as you go.

Instead of climbing the hill at the start, then coasting to a successful finish, you may feel like you're pushing a boulder uphill. Forever. Instead of a success, you'll have a failure or a "challenged" project on your hands.

And nobody wants that.

The alternative is clear: follow ISG's six steps to success with your *iMIS* project. The rest of this document spells out in detail what happens during each step, so that you and your people know exactly what to expect.

Begin with the end in mind. It's a simple concept that we highly recommend for your *iMIS* project.

The Six Steps in Brief

The six-step implementation methodology from ISG Solutions is designed to deliver a predictable outcome and minimize any risk of project failure. This process ensures that an association achieves a high-quality custom solution delivered on time and within budget.

Here is a brief overview of these steps. The rest of this document provides more details on each step.

Step 1: Discovery

In this step, ISG Solutions works closely with the association to discover and document all the requirements of the system, and to establish clear responsibilities for the project team, so that everyone knows what is expected of them. Doing extensive research at the start of the project helps to ensure that no unanticipated surprises emerge later, when they are more costly and time-consuming to deal with.

Step 2: Design

This step translates the association's requirements, as laid out in the Discovery Step, into a detailed design and initial prototype. Having a detailed design committed to in writing and implemented as a prototype ensures that all the association's requirements are taken into consideration early in the process. Once again, this helps to prevent schedule and cost over-runs due to unforeseen changes late in the project.

Step 3: Proof of Concept

The design requirements and prototype developed in the previous step represent a detailed proof-of-concept. In this step, these items are tested and refined until they match the association's requirements in every way. At the end of this step, the Design phase is complete and the project is on a solid footing.

Step 4: Implementation & Testing

In this step the specifications and prototype developed in the previous step are transformed into a full-scale solution tested and ready for staff training.

Step 5: Training

During this step, all staff members who will be using the system are provided with customized, hands-on training.

Step 6: Go Live

In this step the association's new system goes live and its staff begins to use it to accomplish their daily tasks. Any outstanding issues are resolved by ISG's consultants, and ongoing technical support begins.

Pre-implementation Stage

Before any association can start a project, its leaders need to do some preliminary thinking. This can be considered the pre-implementation stage: everything that goes on before an association picks a vendor to help implement the system they've been dreaming about.

Most associations like to speak to more than one vendor, and pick the one that seems most qualified and capable of delivering the kind of system the association needs. An association will find it a good practice to invest some time educating prospective vendors about its infrastructure, time frame and budget.

At a high level, the vendor must be able to identify the objectives and scope of the project, and provide an estimate of the effort. Different vendors may use different terminology, but they should all identify essentially the same tasks.

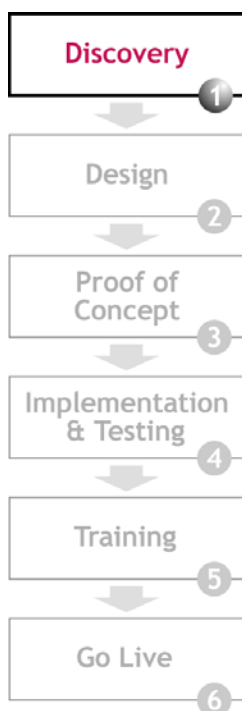
At the end of this stage, the association will choose a vendor. When an association chooses ISG Solutions, we become a business partner and work with its project team, following these six steps to success in implementing the *iMIS* software.

Design Stage

The Design stage requires a major effort from both the association and ISG’s consultants. While this is typically the most painful part of any project, the end result is a detailed plan for implementing a system that does exactly what the association needs it to. By working hard to visualize exactly how the association wants its system to look at the start, this approach ensures that the project is a complete success at the end.

There are three steps in the Design stage: Discovery, Design and Proof of Concept.

Step 1: Discovery



The main purpose of this step is to learn the business processes of the association and to discover and document all the requirements of the association’s system. A secondary purpose is to establish clear responsibilities for the project team, so that everyone knows what is expected of them. Doing extensive research at the start of the project helps to ensure that no unanticipated surprises emerge later, when they are more costly and time-consuming to deal with.

The Discovery step consists of the following major tasks:

- ▶ Designating the association’s project team
- ▶ Holding a kick-off meeting
- ▶ Researching and documenting the project requirements
- ▶ Reviewing and signing a requirements document

Each task is described in more detail below. Beyond these major tasks, the project team members also attend status meetings and review the project scope, budget and timeline. These meetings and reviews continue throughout the lifespan of the project to help ensure that the project stays on track at all times.

Designating the association’s project team

The association selects a project manager and project team members. This team should include at least one senior person, such as the Executive Director, CFO or CTO, as well as a mix of senior and junior staff, long-time and new employees. The association commits these staff members to participate in the discovery process by reviewing procedures, attending interviews and finding background materials, if required, for the ISG consultants.

Holding a kick-off meeting

The kick-off meeting is attended by the association’s project team and led by ISG’s consultants. At this meeting, the roles and responsibilities of each team member are clarified. The project scope, budget and timelines are also presented to help educate all team members.

Researching and documenting the project requirements

Project team members prepare relevant business materials for ISG’s consultants to review. These materials can include procedures, forms, workflow processes, reports and a list of the association’s technical infrastructure. Team members may also be interviewed on more philosophical matters such as the association’s

direction, goals and needs. Based on this research, ISG's consultants document the association's data sources, user workflows, business rules, reporting requirements and financial controls. They also review the project's budget and timelines to ensure that these are realistic.

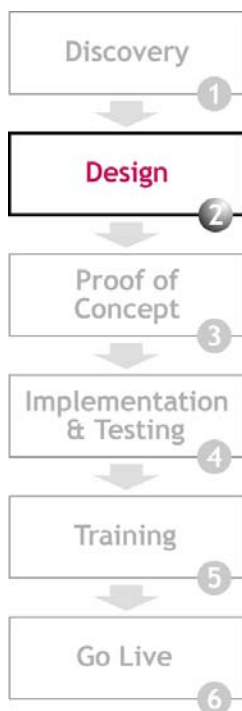
Reviewing and signing a requirements document

The project team leaders carefully review the requirements document to ensure that it reflects their understanding. They submit any comments to ISG's consultants, who revise the document accordingly. When the requirements document has been revised as required, the project manager signs off on this document.

Key Deliverable

The key deliverable produced during this step is the requirements document that documents the association's needs. Once the association has signed off on this document, the project moves on to Step 2: Design.

Step 2: Design



The purpose of this step is to translate the association’s requirements, as laid out in the previous step, into a detailed design and initial prototype. Having a detailed design committed to in writing and implemented as a prototype ensures that all the association’s requirements are taken into consideration early in the process. Once again, this helps to prevent schedule and cost over-runs caused by making changes late in the project.

The Design step consists of the following major tasks:

- ▶ Developing the Standard Operating Procedures (SOPs)
- ▶ Writing the functional specifications
- ▶ Writing the technical specifications
- ▶ Building an initial prototype

Each major task is described in more detail below. Beyond these major tasks, the association ensures that project team members are available to answer any queries and attend status meetings. The project managers keep all team members aware of the project timelines and revisit the project budget and timeline.

Developing the Standard Operating Procedures

A Standard Operating Procedure (SOP) is a written set of instructions that describe the normal procedures for running the association. During this step, the association begins to gather information and formalize these procedures. This process must be completed before reaching Step 5: Training. It is best for an association to write its own SOPs; however, these can be written by ISG Solutions.

Documenting all the key SOPs of an organization can seem like a daunting task. However, having SOPs in place pays for itself in more efficient staff training and better operational continuity.

Writing the functional specifications

A functional specification, or “spec,” is a written document that describes in detail how users will interact with a system to meet the association’s requirements. To create this spec, ISG consultants develop use cases that show the step-by-step interactions between users and the system. They also determine the best configuration options for the *iMIS* software and install them accordingly. Then the consultants configure the association’s membership dues calculations, set up rules for structuring its events, and set up its committees.

The consultants then prioritize the reports required from the system. Since some associations require hundreds of reports, setting up these reports is an ongoing process that can extend past the system’s Go Live date.

Writing the technical specifications

A technical specification is a written document that describes in detail how a system will be designed to meet the association’s requirements. To create this spec, ISG consultants design the database schema (structure) and the user interface (how the system looks on the computer screen). They decide how to implement the association workflows. The consultants also define the integration points where the system needs to exchange information with other software systems. During this task, the consultants revisit how many customizations and/or

modifications are required and how much programming will be needed to implement them.

Building a prototype

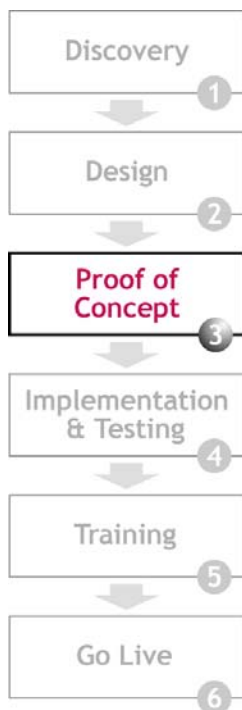
Based on the specifications created in this step, the ISG consultants build an initial prototype of the system. This prototype includes screenshots that help staff members visualize how to complete a task using the new system.

At this time, the association develops an issues log to track any changes to the scope or requirements of the project.

Key Deliverable

The key deliverables created during this step are the design documents: a functional specification and a technical specification. An initial prototype of the system is also created and prepared for testing. Once this prototype is created, the project moves to Step 3: Proof of Concept.

Step 3: Proof of Concept



The specifications and prototype created in the previous step represent a detailed proof-of-concept for the new system. The purpose of this step is to validate and refine these items until they conform precisely to the association’s requirements.

As the final step in the Design phase, this is an essential process that cannot be cut short. The association must invest sufficient time to thoroughly perform this step and clearly identify any required changes. It is still cost-effective to make revisions at this point, before any significant investment of time and materials has been made to implement the system. Any issues not identified until later will be many times more expensive to fix.

The Proof of Concept step consists of the following major tasks:

- ▶ Educating the association’s project team about the prototype
- ▶ Reviewing the functional and technical specifications
- ▶ Reviewing and revising the prototype
- ▶ Presenting the prototype to the association staff and management

Each major task is described in more detail below. Beyond these major tasks, the project team continues to write the SOPs, and reconfirms the project scope, budget and timeline.

Educating the association’s project team about the prototype

ISG’s consultants review the functional specifications, technical specifications and prototype with the association’s project team.

Reviewing the functional and technical specifications

The project team reviews the functional and technical specifications to make sure that they closely reflect the association’s business processes. The project team agrees on any changes required, and ISG consultants revise the specifications accordingly.

Reviewing and revising the prototype

The prototype includes screenshots that help the project team visualize how staff will interact with the new system and assess its design and functionality. The project team tests the prototype in detail to make sure it matches the association’s requirements. ISG’s consultants use this feedback to revise the prototype accordingly.

Presenting the prototype to the association’s staff

After the prototype has been reviewed and revised by the project team and consultants, the association’s project team presents the prototype to one or more meetings of all association staff and management. This is a valuable opportunity for staff to visualize how they will interact with the new system and begin to take ownership of it. The association’s project team documents any feedback from this meeting. ISG consultants make any further revisions until the prototype accurately models the association’s requirements in every way.

Key Deliverable

The key deliverables created during this step are a thoroughly validated prototype of the system and a finalized fixed price implementation cost.

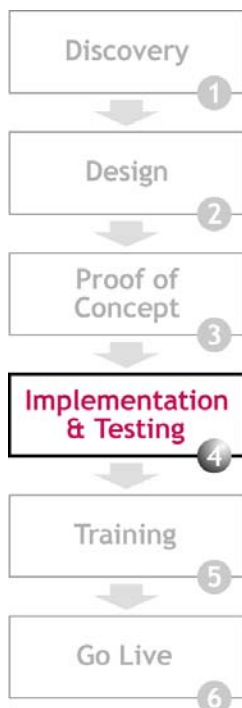
Once the prototype is validated and revised, the Design phase of the project is complete. At this point, the project is on a solid footing that will support a predictable outcome and a successful implementation. The project then moves into the Deployment phase with Step 4: Implementation & Testing.

Deployment Stage

The Deployment stage is when the project team’s earlier efforts pay off. With a thoroughly validated design, the consultants can smoothly implement the association’s requirements with no need for second-guessing or rework. After being implemented, the system is tested and all staff trained on how to use it. Ultimately the system goes live on schedule, within budget, and with all the features that the association originally intended.

There are three steps in the Deployment stage: Implementation & Testing, Training and Go Live.

Step 4: Implementation & Testing



The purpose of this step is to transform the specifications and prototype into a full-scale solution, tested and ready for staff training.

The Implementation & Testing step consists of the following major tasks:

- ▶ Performing all required programming
- ▶ Developing test plans and performing all testing
- ▶ Fixing issues uncovered during testing
- ▶ Preparing for staff training

Each major task is described in more detail below. Beyond these major tasks, the project team purchases any hardware required to support the new system, completes the SOPs, reconfirms the project budget and timeline, and revisits the Go-Live plan.

Performing all required programming

ISG’s consultants develop a fully functional system, complete with the finished user interface to support the association’s business rules, workflows, and exception processing. They perform an initial data conversion and do any integration required to link *iMIS* with any other systems. The consultants also write all the reports required before going live. (When an association needs a large number of reports, it is not unusual to have some reports delivered after the system goes live.)

Developing test plans and performing all testing

ISG consultants do internal testing to ensure the system’s functionality and data integrity. Then they prepare formal plans for user acceptance testing by the project team, and provide any required training in how to run these tests. The project team performs the user acceptance testing, which verifies that all system processes work as prescribed in the functional and technical specifications. The project team documents any issues uncovered during testing in the issues log.

Experience shows that expecting a project team to test a new system at their desks is unrealistic. Urgent and distracting business issues inevitably conspire to undermine systematic testing. Instead, it is highly recommended that the

association designate a dedicated testing area where the project team can focus exclusively on testing the system.

Fixing issues uncovered during testing

ISG consultants resolve the issues identified during the testing process. When the project team is satisfied that the issues have been dealt with, the project manager signs off to accept the system on behalf of the association.

Preparing for staff training

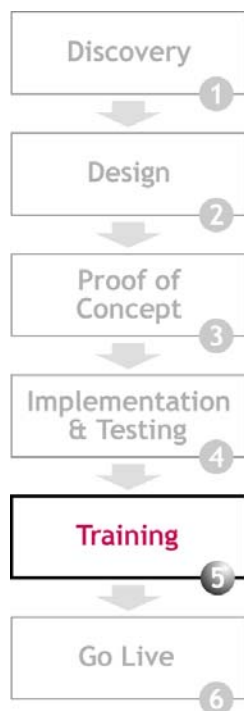
The association prepares user scenarios to be used for staff training. ISG consultants develop the appropriate training plans, customized to fit the needs of the association, and review them with the association's project team.

Key Deliverable

The key deliverables created during this step are a fully functional and thoroughly tested system, a converted member database, staff training plans and complete Standard Operating Procedures (SOPs).

At the end of this step, the new system is developed and thoroughly tested, both by the project team from the association and by Oakley Technologies' consultants. Any issues detected during tested are resolved. All SOPs are complete and plans are in place for training the association's staff members during Step 5: Training.

Step 5: Training



During this step, all staff members who will be using the new system are provided with customized, hands-on training using the association's actual data and workflows.

The Training step consists of the following major tasks:

- ▶ Preparing the training room and schedule
- ▶ Delivering staff training
- ▶ Preparing to go live

Each major task is described in more detail below.

Preparing the training room and schedule

The association provides a dedicated training room, typically the same area used for testing, and develops a schedule that covers all staff members who will use the new system. To maximize the effectiveness of the training, groups consist of 10 people or fewer with similar training needs. In other words, intensive system users and more casual users are trained in separate groups.

Delivering staff training

ISG consultants deliver hands-on training to all staff, customized to the association's operating procedures. Staff members are trained in how to perform their day-to-day tasks using a duplicate copy of the association's database.

Preparing to go live

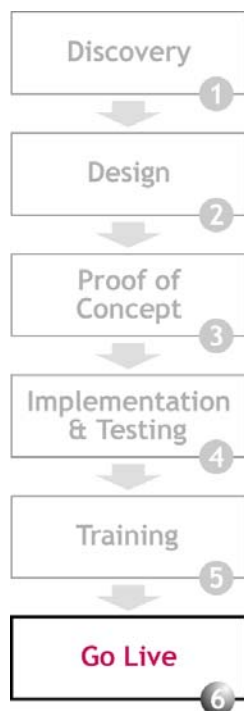
The project team reviews the tasks required to go live with the new system. These tasks may include specifying how system administrators will maintain the data integrity of the new system on an ongoing basis. ISG consultants prepare related maintenance and backup plans.

Key Deliverable

The key deliverables created during this step are the staff training and any required system documentation to support it.

At the end of this step, the association's staff is thoroughly trained and the system is ready to go live.

Step 6: Go Live



The purpose of this step is to “flip the switch” to make the association’s new system go live. From this point, the association’s staff begins to use the new system to accomplish their daily tasks. Any outstanding issues are resolved by ISG consultants, and ongoing technical support begins.

The Go Live step consists of the following tasks:

- ▶ Moving the test system to a production environment
- ▶ Moving into maintenance mode
- ▶ Completing reports

Each major task is described in more detail below. In addition to these tasks, the association signs up for the *iMIS* users group.

Moving the test system to a production environment

ISG consultants move the live data and software applications to the production server. They oversee a brief “blackout period” during which the final conversion of the database to the new system is done. From this point on, processing stops on the old system and all processing is performed exclusively on the new system.

Moving into maintenance mode

The association begins to use the new system for its actual business processes. ISG Solutions provides on-site support for the first 30 days, during which time the association has a chance to “shake down” the new system and uncover any issues not discovered during testing. ISG consultants resolve any new or outstanding items in the issues log. After a 30-day period, the association signs off on the system and the maintenance contract begins.

Completing reports

If a large volume of reports is needed, ISG Solutions works to complete all the required reports within the pre-defined schedule.

At the end of this step, the new *iMIS* system is up and running, with all the features the association planned on. After a successful implementation, delivered on time and within budget, the association moves into productive use of the new system. ISG Solutions provides any ongoing support required.

About the Company

ISG Solutions is a software integrator for associations. We partner with Advanced Solutions International and other industry-leading technology vendors to deliver best-of-breed solutions customized to fit the business processes of associations.

ISG consultants combine technical expertise with a deep knowledge of the association industry to help you maximize the benefits of your association management software. We offer cost-effective, customized solutions that help you communicate with your members, streamline your systems, improve your cash flow and grow your membership base.

ISG Solutions is a member of the ISG Group of companies. The firm is headquartered in Rockville, Maryland and maintains a web site at www.isgsolutions.com.

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