



# Managing Your Conversion Project: Building a Solid Foundation in 6 Steps

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When managing the construction of your dream home, you can hire the most highly acclaimed architect, a trendy interior designer, and an exceptional building contractor. However, if the foundation isn't properly laid, then the entire edifice will be unstable, and you'll be faced with numerous work-arounds, increased building expenses, and continual project delays. When the house is finally completed, it will never feel quite right, and you'll never be totally happy. A solid and secure foundation is the first critical phase of any building project.

This same rule applies to managing a major conversion or upgrade project. So, just how do you build a solid foundation for your project? Here are six critical steps to ensure success:

## Managing Your Conversion Project: Building a Solid Foundation in 6 Steps

1. TRAIN EARLY AND OFTEN
2. DON'T SET EXPECTATIONS TOO EARLY
3. DEDICATE THE PROJECT TEAM
4. MANAGE TO YOUR PROJECT PLAN
5. ESTABLISH STRICT CHANGE CONTROL
6. DEFINE YOUR REQUIREMENTS

### 1. TRAIN EARLY AND OFTEN

One of the main reasons conversion projects fail is because the project, IT, and business teams don't fully understand the new application. How can you expect to submit valid requirements documents if you haven't been thoroughly trained on the new application? Management often sees up-front training as a superfluous expense, but this is one of the most vital project phases. This is where your team discusses current procedures with your vendor, in detail, and learns how to adapt their requirements to the functionality of the new application.

### 2. DON'T SET EXPECTATIONS TOO EARLY

Too many times, company management and project leaders set expectations for conversion dates before they know the entirety of the project scope. We all know what this leads to: rushed project tasks, inadequate testing, mistakes, omissions, errors, increased project costs, frustrated management and project team members, and ultimately, delays in the conversion date. Do yourself a favor: while you may have a preferred target date in mind, be flexible. Set your conversion date after the business and interface requirements are fully defined and agreed upon. When you have a thorough understanding of the project, you can then create a detailed project plan and set realistic and achievable targets.



### 3. DEDICATE THE PROJECT TEAM

Ultimately, your team determines the project outcome. Your project will only move as smoothly and be as error-free as the resources you assign to it. If your resources have other significant priorities, then don't expect your project to achieve targets detailed in the project plan.

### 4. MANAGE TO YOUR PROJECT PLAN

Once your functional and technical requirements are finalized and approved by all parties, and not before, complete your project plan. The plan should be thorough and realistic. Get buy-in from your project team and management, then ... manage to it. Deadlines are deadlines. Late deliveries should have to be explained and project team members should be held accountable.

### 5. ESTABLISH STRICT CHANGE CONTROL

Scope creep is the #1 reason that projects fail to be delivered on-time and on-budget. Left uncontrolled, scope creep will make a very successful project look like a failure to executive management. Before approving requirements changes, the effect on the conversion date should be considered. Think about delivering additional or changed scope requirements with a Phase II deployment. At a minimum, executive-level stakeholders should be required to approve any proposed changes in project scope.

### 6. DEFINE YOUR REQUIREMENTS

Requirements definition should be finalized and agreed to by all parties before conversion coding, interface development, data mapping, and configuration tasks begin. All too often, we are too eager to get started, so that executive management can review positive progress reports. What could be more important than accurately and thoroughly defining project requirements? Properly defining requirements lets you set achievable targets, minimizes rework, and draws the line between project deliverables and change control.

You would never expect your builder to start framing your dream home before the foundation was in place. Just as the foundation is the first critical phase for your construction plan, so should it be for your IT project. Delivering a successful project is rarely easy. Politics, changing company directives, resource constraints, and technical issues, together or independently, can make it difficult to achieve the planned result. However, building a solid project foundation, by following the recommendations above, should enable you to deliver your project on time and on budget.

#### About SHAW RESOURCE SOLUTIONS

Raleigh deShazo manages **SHAW RESOURCE SOLUTIONS**, Shaw Systems' consulting division. The group has successfully delivered hundreds of projects for companies across the country, including some of the nation's largest banks and finance companies.

From Project Managers to Developers to Subject Matter Experts and everything in between, **SHAW RESOURCE SOLUTIONS** has the critical resources your project needs. Proficient in your industry and systems, these consultants will address your business and technical challenges and deliver the results you expect. The group's services span the complete solution lifecycle, including project management, strategic planning, integration strategy, operational assessments, reporting, conversions, upgrades, training, systems enhancements, and more.