Project Management Services

Implementing new technology but don't have the resources to manage it? Wiss' Technology Advisory team can augment your internal implementation team with experienced technology professionals.

Program Deliverables and Administration:

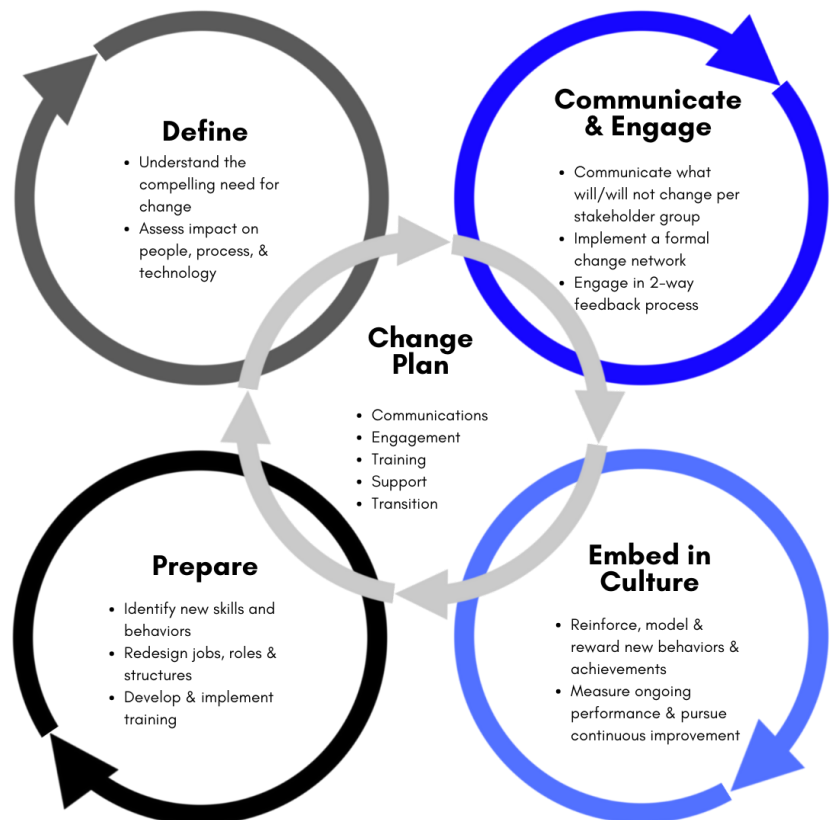**Wiss will conduct the following activities during the selection and/or implementation:**

- Weekly status report and meeting
- Document RAID items (Risks, Actions, Issues, Decisions)
- Steering Committee meeting
- Develop project plans and assign tasks
- Identify project groups by workstream
- Manage the coordination and scheduling of meetings

Organizational Change Management

Organizational Change Management (OCM) is essential to driving a successful software selection and implementation. To achieve business objectives, OCM techniques and activities are integrated into project management (PMO) structure and extend throughout the entire project life cycle.

Our approach to OCM is reflected in how we conduct our selection and implementation activities:

- Prepare and inform individuals
- Iterative design process, focused on the future state
- Avoidance of complex design and unnecessary modifications
- Training throughout the project, not just end-user training
- Change impact analysis and planning for the future state prior to go-live
- Frequent and effective communications

Define
- Understand the compelling need for change
- Assess impact on people, process, & technology

Communicate & Engage
- Communicate what will/will not change per stakeholder group
- Implement a formal change network
- Engage in 2-way feedback process

Change Plan
- Communications
- Engagement
- Training
- Support
- Transition

Prepare
- Identify new skills and behaviors
- Redesign jobs, roles & structures
- Develop & implement training

Embed in Culture
- Reinforce, model & reward new behaviors & achievements
- Measure ongoing performance & pursue continuous improvement

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Functional Area	Consideration
System design: Involvement in discovery sessions to make sure the vendor understands the requirements needed	The Wiss Team will be heavily involved in the design process and can conduct knowledge transfer with implantation teams.
Integrations: Facilitating with your banks, payroll provider, and other systems that need to be connected with the new software	Integrations with third-party systems are dependent upon the technical architecture and availability of pre-built connections.
Data migration: Typically we see clients move over 1 or 2 years of trial balances so YoY and MoM reporting is available.	The extract, transform, and loading (ETL) process is dependent on the cleanliness, format, and scope of the data migration.
Training/Change Management: Proper process documentation and training materials for end users is the key to success.	Software vendors are typically not responsible for training end-users. Wiss can assist in helping develop a formal change management and training plan.
Post Go-Live Support: Wiss can be available and support you with post go-live support. We assist with troubleshooting and process optimization once your team begins transacting in the new tool.	Software vendors typically have post go-live support built into their statement of work. This service is not always included, but it is necessary.

"Implementing a new ERP is like having a second job and our team lacked experience managing this type of project. The Wiss team was critical to the project's success as they advised us through system design decisions, project milestones, and tracked tasks and due dates through project management software where all parties would collaborate in one place. We made the correct choice with Wiss to support us through this critical technology project, and if something shifts in our business, we will call them back!"

– Peg Finkle, Controller | Extremity Medical

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