

CRPs: Myth, Method or Madness?

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CRPs: Myth, Method or Madness?

Are using conference room pilots (CRPs) a myth, method or madness for enterprise application projects? This paper will prove they are a method, one that can be utilized for any type of project, whether it is an implementation of Oracle R12, upgrade of PeopleSoft or the latest Oracle acquisition!

The CRP method focuses on testing, ensuring the product being implemented or upgraded has been thoroughly tested and is ready for release to production. CRPs are prototyping and, according to APICS, “a product model constructed for testing and evaluation to see how the product performs before releasing the product to production.” Keep this quote in mind as you continue to read this article.

CRP Method Approach

Enterprise application projects should not be over-complicated by needless processes and paper – this happens quite often and unnecessarily. The CRP Method approach is unique, as the primary focus is getting to iterations of testing the enterprise applications. The testing iterations (CRPs) have many residual effects, such as increased organizational learning of the enterprise applications, decreased change management because of this involvement, decreased application issues and problems in production, and progressively satisfied team members and management. The testing iterations (CRPs) exercise the implemented or upgraded applications while validating business requirements, setups, migrated data and customizations – all while simulating real business transactions using real business data. The rewards and residual effects of this approach are astounding.

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Phases

The phases of the CRP Method are outlined below. These phases are very similar to many methods but carry the overall objective of reaching the first conference room pilot. An overview of each phase is discussed below. Not all activities within the phases are discussed.

- *Planning and Governance*

During the Planning and Governance phase, the management of the organization is engaged in interactive sessions to help set expectations and direction for the project team and organization. The project team then gets organized and oriented about the project and process, and communication to stakeholders begins.

The project is planned at a high-level; the scope and objectives are defined, and the feasibility of meeting time, resource and budget constraints are evaluated. Establishing scope early in the project gives team members a common reference point, as well as an effective way to communicate with, and set expectations to, stakeholders. Various strategies, such as setup (initial or revisions), data conversion, technical architecture, performance testing and training are established and provide the basis for the project plan and setting project direction.

- *Definition and Analysis*

During Definition and Analysis, the project is planned in further detail; the business objectives and requirements are defined and reviewed, and business processes are presented to the project team. The future business requirements/enterprise applications model is created and the technical team begins the installation or upgrade of the enterprise applications. Application setups begin to be defined or updated; any known gaps are identified and documented, and the project team gets fully engaged with the user community.

- *CRP Preparation: Solution Design, Development and Build*

The purpose of this phase is to prepare the enterprise applications for the first conference room pilot. The objective is to design, develop and build the enterprise applications to meet the future business requirements of the organization.

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As the effort continues, the technical architecture that supports the project is refined and adjusted to meet changing demands. After the enterprise applications installation takes place, the setups are executed or revised, and customizations are designed, developed and migrated. Unit testing of customizations, and other custom software, including application extensions, data conversions, interfaces, custom reports and third party integration is completed. The CRP preparation begins to take shape, and the enterprise applications begin to come alive fulfilling the business requirements set out at the beginning of the project.

Test scenarios are identified and a master test plan for the first conference room pilot is created. Keep in mind, the test scenarios directly support and validate the future business requirements/enterprise applications. The master test plan is used as a communication vehicle to all CRP participants documenting the who, what, where, when, how and why – and why not – of testing. It also includes the instances of the applications that will be used in the CRP, as well as how the project will progress from CRP to CRP.

The master test plan contains information on everything related to the CRPs, and should be able to answer most questions about the scope of testing including hardware, software, customizations, test scenarios, time considerations, locations and people. In addition, performance testing scenarios are identified and prepared, while the training strategy is further refined.

Once this phase is complete, most project activities have been executed. The next phase of the project focuses on executing multiple iterations of CRPs, working issues and problems, tweaking setups, reworking and fine tuning data mapping and customizations, etc. Getting to this point of the project is a great achievement and a cause for celebration, as the “product model” has been constructed and transitioning to production becomes more of a reality.

- *Conference Room Pilot 1 (repetitive)*

The purpose of the CRP phase is to validate that the new system is congruent with business objectives and requirements, both current and future. During the CRPs, integrated test scripts and test scenarios that were created in the previous phase are used, and an integrated, cross-functional test of all solutions including data conversions, interfaces,

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modifications, reports, security and third party products are executed.

The testing is conducted as a formal conference room pilot (CRP) and performed in an environment closely resembling production. The goal is to repeat testing a minimum of three times or until the application becomes stable and issues have been minimized or clearly understood. Throughout the CRP, the core team members will document successes and failures, with all failures documented and addressed by various team members. There are many residual effects of CRPs. Some of these effects are increased organizational learning and decreased change management, as users get more and more involved with the product.

The final iteration of conference room pilots is “user acceptance testing (UAT)” where users sign off to indicate the application works and confirm it is ready for production. On many occasions, users will have completed enough testing that getting sign-off is a non-event. This can be a very rewarding and exciting time for project team members, as their hard work and dedication to the project pays-off.

Other activities include the creation of training documentation and schedules. The training documentation is created based on the testing scenarios defined earlier in the project. You want your organization to be trained using the same scenarios used for testing – you know they work and support business requirements.

The method in which training is delivered varies per project and may be based on methods defined by the organization, such as internal training products currently in use, the existence of a training team or department, and the availability of dedicated project team members to lead and deliver training. When creating a training schedule, also be sure to consider the locations of people, time zones and training facilities.

The production transition strategy and production stabilization plan are reviewed, updated, finalized and delivered to the appropriate team members. The production transition strategy documents how the organization will transition from old to new – from the old legacy application to the new enterprise application, or from the old version of the

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enterprise application to the new version. What supporting information does your organization, locations, etc. need to help guide and support them during this critical transition? The production stabilization plan is the guide for users of the enterprise application after “go-live.” It can serve to answer questions such as who to contact when something goes wrong, how to reach the help desk or production support team, what to document and provide to the support team, how to communicate, etc. It is important to have this plan in place and properly communicate it to all users of the application.

The foundation of the entire project and the CRP Method, as outlined in the steps below, can be used to identify, define and execute conference room pilots.(See Diagram 1) [on last page of Word doc]

CRP Method Steps:

Step 1: Identification

- Analyze current business processes, taken from current process models, interviews or a business requirements study.
- Determine future business requirements, from statement of direction, product features or changing business needs. (Most organizations have ideas documented or undocumented and in someone’s head, or perhaps an organizational applications strategy.)
- The outcome from the previous two activities yields the organization’s new, “future” business requirements/enterprise application model, which will be used in later steps.

Step 2: Definition

- Generate a list of business scenarios that supports the “future” business requirements identified in Step 1.
- Create test scenarios and steps for each business scenario. It is important to connect these scenarios to help with future validation and confirmation that the configured product meets the organization’s business requirements.

Leverage these documents to:

- *Create a training strategy*

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- *Create training scenarios (material used to train end users)*
- *Determine which training delivery method is best: instructor led, online, or a blended learning approach.*
- Remember, testing scenarios are critical for the remainder of project as they:
 - Must use real business processes, examples and data
 - Get users involved in creating them (a learning opportunity for users and project team members)
 - Are possibly created by leveraging documents previous projects
 - Validate business scenarios (testing and business scenarios must be aligned)
- Allow unstructured testing, but keep track of what users do. (You want documented feedback from them. The users will really like this!)
- Capture time- to-execute test scenarios, document expected time and results, and capture actual time and results. (This data feeds the CRP Method metrics discussed later in this article.)
- Create a master test plan (per CRP).

CRP Step 3: Execution

- Refine and complete master test plan (per CRP):
 - Gets the testing effort well organized
 - Defines scope of effort for testing
 - Provides details about testing to all stakeholders involved
 - Sets schedule for all resources involved
 - Documents the enterprise applications instances to be used, as well as promotion from CRP_x to CRP_x
 - Takes into consideration time zones
- Begin execution of first CRP iteration. (This may be one of many.)
- Document and resolve CRP issues:
 - Track open issues and defects. (These are different!)

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- Obtain sign-off at the completion of each CRP.
- Document and obtain sign-off for any open issues or defects, and clearly communicate what is not resolved and why.
- Validate remote testing, bi-product confirms that network is working effectively, performance is optimal, etc.
- Focus on a minimum of 3 CRPs – or until the users say they've had enough!
- Strive to implement multiple CRPs. Multiple CRPs are highly recommended, as the more testing you perform and the more issues and defects you address in the CRP, the fewer problems you will experience in production!
- Consider that progress to CRP3 may go quickly or slowly, depending on issues, user involvement and the pace of the project.
- Meet regularly each day to start out each CRP, then adjust depending on progress/issues/defects.
- Monitor, manage and control progress tightly.
- If the CRPs work well, UAT should be a non-event.
 - UAT = user acceptance testing = sign-off = happy users = happy management = happy vendor = success
- *End User Training*

The enterprise application training material is created based on the business requirements previously defined. A blended learning approach is quite common on enterprise projects and will most likely include instructor-led training, on-line learning and end-user training handouts or job aids.

Essentially, training material will be created using the same test scenarios that were identified earlier in the project. This approach ensures the business requirements are aligned with testing scenarios and the testing scenarios are aligned with training scenarios. This alignment is critical to reinforcing business requirements and helping users learn the way the product will be used within the organization.

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- *Production Transition and Stabilization*

During Production Transition and Stabilization, the project team releases the enterprise applications to the organization – they are ready for prime time! All elements of the project must come together to transition the organization successfully to “production.” This marks the last phase of the project, and the transition to production stabilization begins.

Production stabilization focuses primarily on making sure the organization is not negatively affected in any way by the new enterprise application. The objective is to resolve issues and help the team understand who to contact in case something is wrong and what actions to take in case of an emergency. The production stabilization plan will document all activities needed to provide efficient and effective support during this time.

Metrics – measuring for success!

Within the CRP Method, there are processes for measuring, managing and controlling all aspects of a project. These metrics are based on the earned value method and are critical for communicating progress to management and stakeholders and providing the information teams need to make critical decisions. Most of these metrics are measured daily and weekly. During CRP execution they are measured daily.

Below are report/graph examples that are very helpful during an enterprise application project.

- Functional/CRPs:
 - Testing Expected Time to Actual Time (also measure quantity) (daily)
 - Enterprise Application Module Test Results - Progress to Planned (daily)
 - CRP Tester - Progress to Planned (daily)
- Project:
 - Progress to High-Level Plan (milestones – weekly status report)
 - Planned Time/Expense to Actual Time/Expense (budget time and dollars, monthly/semimonthly)
 - Defect/Issues Log (daily)
- Technical:

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- Implementation/Upgrade Category Progress to Plan (daily/weekly communication from DBA team)
- Implementation/Upgrade Assistance Step to Plan (daily/weekly communication from DBA team)
- Oracle Metalink SR reports (run daily)

Why the CRP Method?

Why use the conference room pilot method? Using CRPs offers multiple iterations of testing, as well as opportunities to get the project team engaged and users involved by participating in testing. In some cases, this will help ease doubts about the product selection, as the users get to relate the application to their business by using the application with real data in a real working environment. The residual effects of how much the organization learns about the product does wonders. It turns team members and users involved into change agents as they learn and accept the new product, easing the need for change management activities.

When to use the CRP Method?

When is the best time to use the CRP Method? CRP's can be used for any implementation or upgrade, whether it is an Oracle E-Business Suite implementation, an upgrade of PeopleSoft or quite possibly the latest Oracle acquisition – CRPs are applicable to any type of project and product. They can also be used when adding a new module to an already implemented enterprise application suite, or aspects method can be used after a major patching effort or business process change.

Conclusion

Are using conference room pilots a myth, method or madness of enterprise application projects? The details of this article show that it is a method not a myth and that the madness only comes from not having a solid method or approach.

The CRP Method for executing enterprise projects is not necessarily new, though not explicitly documented. Components of the CRP Method can be found in many implementation methods, though the CRP Method distills the monolithic methods into a concise, focused and repeatable

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effort that any organization can use. In conclusion, the CRP Method is real, not a myth; sanity, not madness; and a method that is noteworthy, effective and efficient.

About the Author

Bill Dunham, the founder and principal of OATC, Inc., is a renowned Oracle Applications and Technology consultant. His extensive experience with Oracle Applications and Technology makes him a trusted advisor to many clients. Bill has presented papers at many local and regional OAUG events and presented for Oracle Corporation at Oracle AppsWorld. Bill has authored articles for OAUG INSIGHT magazine, as well as co-authored two books, "Special Edition Using Oracle Applications" and "Special Edition Using Oracle 11i." Bill has worked in many capacities over the years mostly focusing as a Project Manager and Quality Assurance Manager for many client projects in the United States and Europe. Bill holds a BS in Computer Science from High Point University and an MBA from Wake Forest University.

See CRP Method Steps on next page.

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Diagram 1

The CRP Method Steps

