

Project Management Strategies to Ensure a Successful Global Implementation

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Introduction

Project management for any size IT implementation is a challenge. Coordinating resources, troubleshooting unexpected issues and avoiding the micro-management factors are all expected hazards of the job. Add cultural differences, varying regulatory requirements and language barriers to the mix – the mere baseline complications of global implementations - and it's easy to see why global projects induce high levels of angst and fear. Without question, they are an extraordinary challenge – and one with a high failure rate.

And yet for clients, the rewards of global implementations can be staggering. TUSC recently completed a major global implementation of the Oracle E-Business suite, spanning 22 countries and three continents. The project was completed on time, on budget and it has reaped huge benefits for the client by providing one single platform for global finance for the first time in the company's history.

What specific strategies helped TUSC be successful and can help you do the same? As in any project, strong project management skills were essential; but this white paper will explore tips and strategies that extend beyond normal project management guidelines and which have helped companies successfully manage global Oracle implementations for years.

The collaborative, global project team

Ensuring you have the proper team in place is the foundation for a successful global project. As with any large-scale project, overall responsibility for the project should be maintained at the executive level. Having a steering committee comprised of executives is key to ensuring your project receives the attention it deserves and that you have access to the resources you need. However, let's explore the global team make-up at a more granular level.

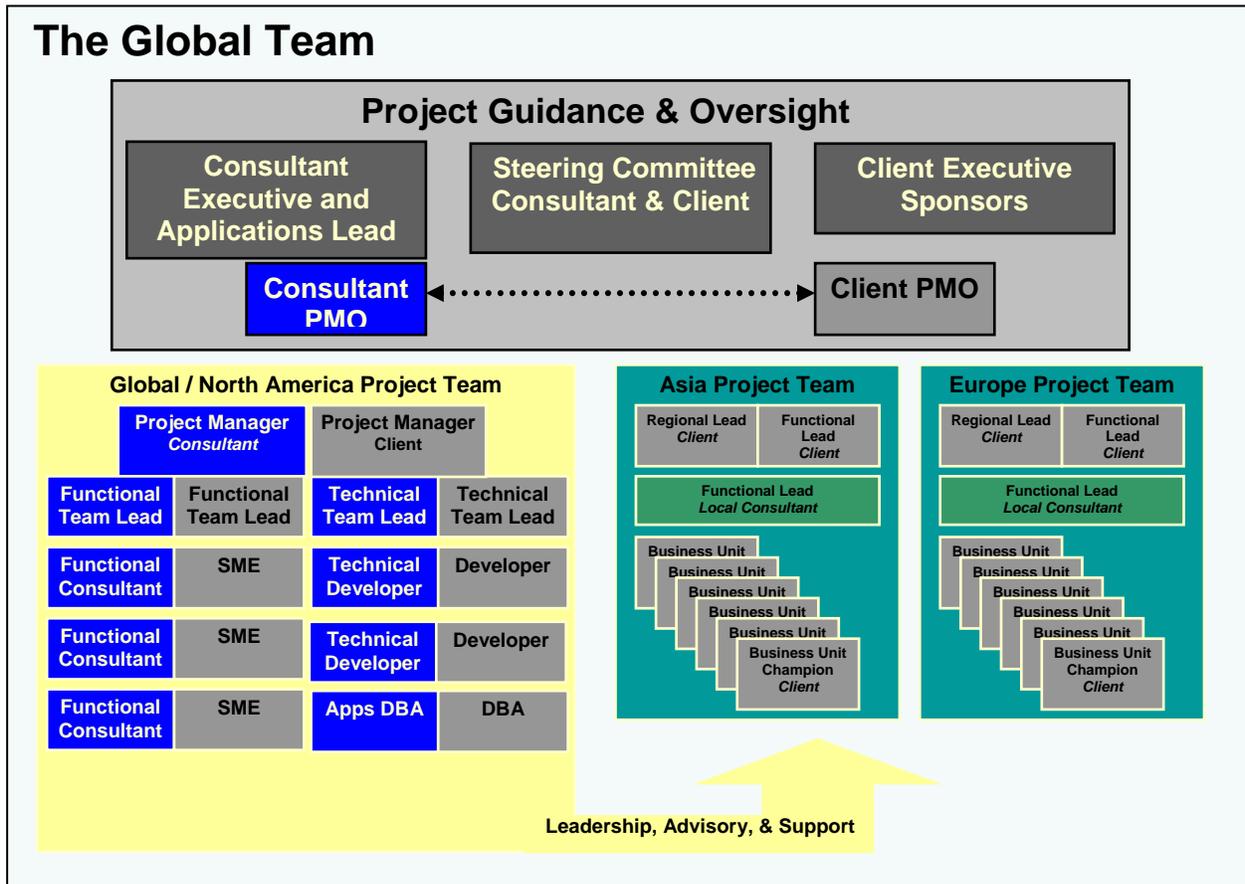
For this latest project, TUSC was implementing in three primary areas of the world: North America, Asia Pacific and Europe. Because North America included the customer's headquarters and its corporate general ledger, the project was driven from North America, and the North American team was by far the largest. Wherever your global team is based, project management should be jointly shared between the consultant or implementer and the client project manager. Together, these individuals should have complete oversight and ownership for the entire project. They are the ones that truly own the project plan. Subject matter experts from all critical areas - on both the business and functional side – should also be part of the global team. In this latest project, that meant that individuals representing Financials, Procurement and Operations were all key stakeholders, and most of these functional and business experts were mapped up one-to-one.

You'll also want to have an extended project team, comprised of end users of the various applications. These individuals will make key contributions at critical phases throughout the project, including requirements definition and conference room pilots.

One of the most critical factors for success in a global implementation is incorporating regional teams. Although project management was handled out of North America in TUSC's recent project, the project manager also established regional teams in Asia Pacific and Europe. For each region there was a team lead, with additional representatives from every country in the region. Although these regional teams were not driving any of the project planning, the team leads from each region served as spokespeople for their team during all phases of the projects. These regional teams focused solely on the business side of the project.

As an additional resource, TUSC also employed consulting expertise at the regional level. These consultants were there to support all the different countries in their region from both a project management and technical perspective. They also helped handle issues including verbal and written translation when required.

A visual perspective of the global team breakdown follows below:



Why are regional teams so important? One major mistake companies make is attempting to manage a global project remotely. While project planning can be driven from afar, it is critical to ensure that stakeholders in all regions feel ownership for the success of the project, and at a more base level, that there is someone centrally located to manage project sub-plans. It's extremely difficult to coordinate daily activities from thousands of miles away. In addition, creating a true global team goes a long way towards establishing good will and buy-in for final implementation.

At the same time, having regional teams in place does not completely absolve the need for travel. Nothing is better than a face-to-face meeting, and you should anticipate having at least a few such meetings at critical points throughout your global project.

Guiding principles and the global standard

With the global team established, the next critical step is defining a global standard. In other words, you need to identify the baseline implementation that all business units, countries and regions should share in common. If you're attempting a truly global implementation – where the company's goal is to share one database instance worldwide, the intention should be to keep the applications relatively standardized amongst all locations. Users should be following the same path, whether they're executing a purchase order in Japan, San Francisco or Italy.

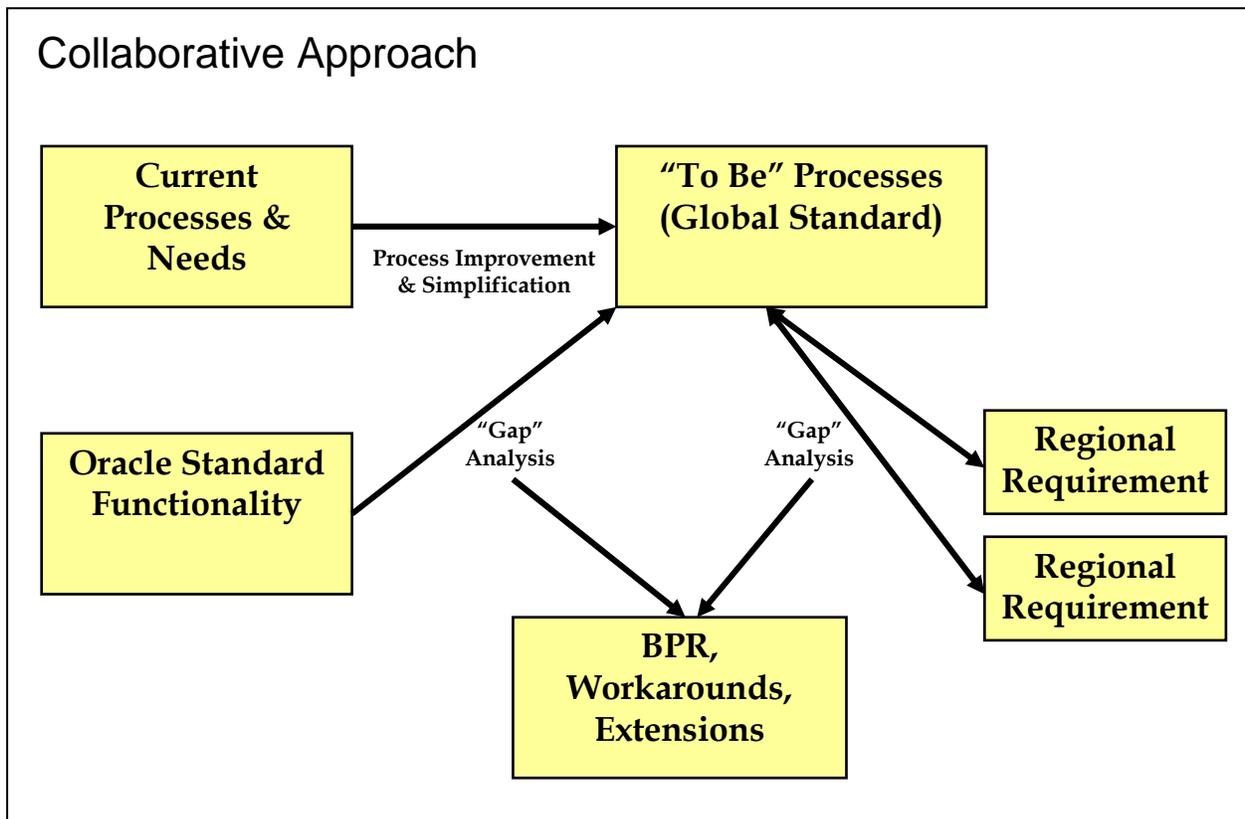
One key guiding principal in developing the global standard is ensuring the use of standard and advanced Oracle functionality whenever possible and addressing process change before considering technology customization. It is counter-productive to make changes to different forms or add a lot of triggers in a global implementation. Remember, it is a "global" project. Customizing forms for one affiliate opens the door for others and can lead to endless requests for customizations. The project budget and schedule both suffer whenever customizations are

introduced. When there is a way to adjust the process rather than customize the application, business process re-engineering is *always* preferable.

For example, in a recent implementation, the fixed assets' stakeholders required that TUSC capture specific IDs on fixed assets, tracking depreciation across various methods. Instead of writing a customization, the project team utilized Oracle Forms personalization to capture that data upon receipt and propagate it to other areas within the application. Oracle Forms is invaluable during global implementations because it provides end users with the choice of whether or not to invoke the form through a special menu. In this way, you can fulfill regional requirements for specific pieces of functionality, but avoid customization.

As you're defining the global standard, it is critical to remember that you are a *global* team with a regional focus. In other words, although the global standard may have been driven by TUSC's North American team in this latest project, they worked diligently *not* to design it solely for North America. The team had insight into what Europe and Asia needed the system to do and took those requirements into account when designing the global standard. For example, the team knew that purchasing responsibilities within the firm varied greatly throughout the world. While purchasing was handled by the purchasing department in the United States, in some offices overseas, purchasing is the responsibility of an office manager or assistant rather than a formal department. With this understanding, the team altered its standard for security settings accordingly while still maintaining the required segregation of duties.

The following diagram visually represents the process of defining your global standard:



Once your global standard is defined, make it a priority for everyone to adhere to that standard except in the rare instances where statutory requirements may dictate an exception or as necessitated following a conference room pilot. Then and only then should you deviate from the plan.

Logistics and time management

The logistics involved in project planning with a multi-country implementation are staggering – and not simply due to varying time zones. With cultural differences extending to vacation and work-day routines, up-front planning is essential.

When in the initial planning stages of your project, investigate the typical vacation and work schedules for the various regions and countries involved in the implementation. While most Americans average two to three weeks of vacation a year, Europeans average four to six weeks and have flexibility to take it whether there's a project underway or not. You need to know in advance when your valuable resources are going to be missing from the project and build time into your plan accordingly for any dependencies.

Although there are many tools you can buy, you can also help yourself track critical resources in a traditional Excel spreadsheet such as the following:

Resouce Schedule																				
Operations Schedule	Mon 4/10	Tues 4/11	Wed 4/12	Thurs 4/13	Fri 4/14	Sat 4/15	Sun 4/16	Mon 4/17	Tues 4/18	Wed 4/19	Thurs 4/20	Fri 4/21	Sat 4/22	Sun 4/23	Mon 4/24	Tues 4/25	Wed 4/26	Thurs 4/27	Fri 4/28	Sat 4/29
Brad Northbrook																				
	CRP I - North America																			
Tom Germany					HOLIDAY			HOLIDAY	Vaca											
Laura Northbrook		Home - AM																		
	CRP I - North America																			
Mike Northbrook																				
	CRP I - North America																			
Eva Hong Kong																				
	CRP I - North America																			
Paul San Francisco																				
	CRP I - North America																			

This simple Resource Schedule can be used to track every team member's holidays, vacations and days off. Remember, in a global implementation, everyone may not have Outlook or Notes calendars for you to access. The Resource Schedule allows anyone on the team to schedule a meeting and easily track who is available when.

In the same vain, not all countries work an "8 to 5" day with a one-hour lunch. Understanding the work cultures of the regions with which you're interacting is critical to project success. You may find that team members in the Asia-Pacific region tend to start later in the morning and work later into the evening, while Europeans typically take a two-hour lunch.

With time zones across the globe and varying work schedules, it can be extremely difficult – and sometimes impossible – to organize meetings during common office hours that work well for everyone. Having everyone together as a team is invaluable, but at some point during a global implementation project, it means that participants are going to be joining conference calls at 5 a.m. in the morning or 10 p.m. at night. To help ensure a cohesive team, it helps to have every location shoulder this burden at different points during the project. In other words, rotate the ideal meeting time by location. For two months, schedule meetings when it's convenient for North America. The next two months, pick another time zone and have everyone adapt to that.

Although generally a one-time issue, daylight savings can also wreak havoc with your meeting scheduling as non-US countries do not adapt for it. Be sure and adjust meeting schedules accordingly so international participants aren't dialing in to meetings an hour early or an hour late.

In addition to scheduling meetings, time zones present an enormous challenge for instance availability and scheduling system maintenance. From Sunday to Friday, there may only be a two- to three-hour window each day to perform maintenance activities. Any major patch should be held for the weekend (Friday night and Saturday in North America). Although a hassle, ensuring database instances are available to all parties as frequently as possible is a necessary evil to keep the project moving forward on track.

Communication

Without question, one of the greatest success factors in a global implementation is effective communication. The first obvious barrier to that end is language.

Although English will more than likely be the common language for nearly every global project, it's important to remember that English is still a second language for many participants. During meetings, native English speakers need to be cognizant of the fact that other participants may not understand idiomatic expressions, certain vocabulary, analogies or jokes. Unlike in a face-to-face meeting where you have facial expressions to guide you, it's not always clear whether or not your message is being understood when communicating via phone and e-mail. When conveying a point, it's important to limit vocabulary to essential words and concepts. Visual communication tools can also be invaluable here for ensuring comprehension. On the flip side, caution your native English speakers to carefully listen and thoroughly read e-mail messages in order to fully comprehend what a non-English speaker is trying to tell them. Communication within a global project cannot be over-emphasized. Although it is a "soft" issue, there are very real consequences. Misunderstandings can lead to distrust which can lead to poor communication and ultimately project failure. Yet, as long as everyone is aware of the potential for misunderstandings and guards against them, cross-cultural meetings can be a rich information exchange and a motivator for participants.

Understanding everyone's role on the team and being able to contact them easily is also key for effective collaboration. You can create a simple Project Contact spreadsheet in Excel that includes each individual's team, location, contact numbers, and his or her primary role in the project. This Project Contact list can be another tab on the Resource Schedule file discussed earlier.

Project Team Meetings

Keeping up with all the meetings involved in a global project is a job in and of itself. For such a large-scale project, it makes sense to break meetings into manageable groups. In TUSC's latest project, the meeting schedule included three weekly project team meetings (global, regional and team lead), weekly steering committee meetings, a monthly extended project team meeting and weekly status reporting.

The weekly project team meeting with the global North American team was similar to the standard project management meeting one would hold for a domestic implementation. Since this was the team that was driving the project, keeping this group on track and understanding any hot issues was critical. TUSC also conducted regional meetings in Asia and Europe with long-distance representation from the global North American team.

As with any project, one-on-one meetings between the project manager and individual business champions or global team leads can be invaluable. Sometimes participants are hesitant to share concerns or issues in a large-group setting. While you should certainly encourage participants to be forthcoming in group meetings, one-on-ones can be quite effective for garnering additional information that can then be digested and disseminated at a later time.

In addition to project team meetings, consider holding a weekly steering committee meeting to keep the project sponsors and executive management informed and invested. These meetings should not be detail oriented, but brief and to the point, lasting no more than half an hour. They are a high-level overview of how each region is proceeding and any major scope changes that have arisen.

On a monthly basis, TUSC conducted extended project team meetings with North American end users of the application, along with representatives from Europe and Asia. Depending on the scope of your project, these

meetings can be held between every four to six weeks. Core individuals from the project team may attend these meetings, but the primary goal is to receive input from the business users and to obtain their buy-in for the changes to come.

As with any project, the other communication strategy TUSC employed was status reporting. Each regional team summarized their particular status on a weekly basis. A consolidated, rolled-up status report was then created and distributed to the entire team via e-mail.

Scope management

Scope management is a critical factor in keeping your global project on time and on budget. Although it isn't that much different for a global project than it is on a domestic one, the impacts of scope change can be far greater when multiple business units and countries are involved.

Whenever faced with a scope change, look at the impact from all possible angles. Ask yourself: "Is it really necessary? Do we need to do this? Is there another way around it? Can we come up with a different method of remedying the situation without such a drastic change?"

If there is no viable work-around and the scope change is accepted, you must quickly put together an action plan and determine how to incorporate that scope change into the overall project as it may have schedule ramifications for multiple regions. Costs can multiply quickly – especially when factors such as travel costs are overlooked in estimates.

As a way of limiting scope change and ensuring executive buy-in, anyone on a TUSC project can submit a scope change, but it is up to the project management team and the steering committee to review major scope changes and approve any plan to move forward. If you have done thorough impact analysis and cost justification, you will be prepared to take scope change to executive management and obtain executive support.

Conference room pilots and instance management

Conference room pilots (CRPs) are usually some of the first times the end users or super users will have the chance to see the system from an end-to-end business perspective. These CRPs should occur fairly early on in the project so that if there are any major issues, there's enough time to remediate issues and change configurations.

In a well-planned CRP, the project team, extended project team and additional super users for a particular department or area are typically present. Scripts should be used and should be based on global business processes, accounting for the localizations in place for different regions. Data used in the CRP should represent the business' processes and procedures within those operating units or countries.

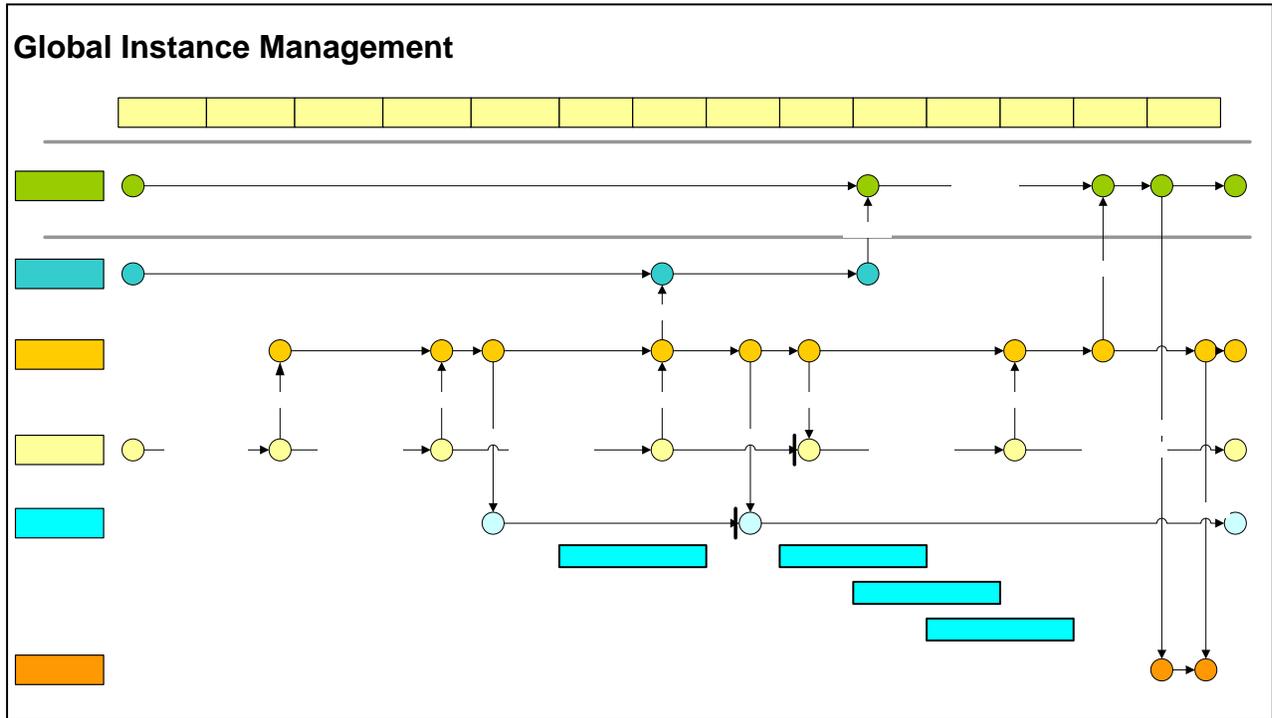
It's also important to lock down your CRP instances. Once you establish all the set ups, configurations and what the process will be, lock down your CRP instance to prevent other users from making changes and keep it in a steady state. You want your CRP to truly simulate what production will look like.

Importantly, each region in the global project should have its own CRP. In fact, for TUSC's latest project, each region had a minimum of two CRPs and at least one user acceptance testing (UAT). Try to avoid a "big bang" approach to either CRP or final implementation. A staggered approach lets you uncover issues from one CRP and apply remediation strategies to make the next CRP even more seamless. Identified issues should be well documented, and once remediation is performed, results should be shared with the other regional teams.

Once a particular process or area is completely proven out, declared bug free and accepted by the user on the client side, you can move it to a "gold instance." This will maximize your technical team's work so that they're not re-creating set ups and configurations every time you need a new CRP instance.

Keeping track of all the instances involved in your CRPs and UATs can be challenging. Once again, you can create a simple Excel file to visually depict exactly where you are within the configuration of different test, goal and development CRP and UAT instances. In the abbreviated example below, you're easily able to see where the source

system is coming from, whether it was a clone configuration, where those configurations came from and where they went to next.



This tool provides a nice visual perspective and allows everyone to see where the instance is being taken from and upcoming deadlines for configurations.

Conclusion

Without question, global implementations are daunting and the challenges are many. Yet, success is more than possible — it is both repeatable and predictable when you follow PMI and Oracle AIM best practices in concert with the strategies and tactics described in this paper. With diligent planning, consistent communication, and a well-chosen team, you can reap the rewards of a global Oracle implementation and enjoy watching your clients do the same.

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