



**GUIDEDELINES FOR  
IMPLEMENTING PLANNING AND  
SCHEDULING SOFTWARE  
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# INTRODUCTION

- Many companies embark on the implementation of new planning and scheduling software for good reasons
- Unfortunately there are cases where planning and scheduling software has operated well, but the implementation process failed for non technical reasons and the software was not being used for the intended purpose
- This paper is intended to look at some of the reasons why the implementation of corporate planning and scheduling systems fail and outline some of the steps that should be considered to minimise the risk of failure.

# AIM

- The aim of this paper is to outline some guidelines for organisations to use when looking at implementing a corporate project planning and scheduling system or often known as ERP systems
- Many of these guidelines equally apply to the implementation of a stand alone planning and scheduling system.

# SCHEDULING SOFTWARE SELECTION

- When selecting software make sure you clearly identify your organisations requirements and then source software that is designed to meet your requirements
- There are many problems and pitfalls when selecting planning and scheduling software. Ultimately the choice will be a compromise, but there are a few factors that need to be considered:

# SCHEDULING SOFTWARE SELECTION CONTINUED

- Do you actually need a new system?
- Is there support available for the software in Australia?
- Is there a promise that a feature will be developed?
- Don't buy software with a small or declining user base
- Be careful of overseas compatibility
- Speak to as many of the existing users as possible
- Ensure it meets all or most of your requirements
- Ensure that all key stake holders are involved.

# SCHEDULING SOFTWARE SELECTION CONTINUED

- Don't leave the selection process to the IT or accounting
- If you think that you will require many copies of the software, then you are probably wrong
- Don't sign up to a long-term commitment for training
- Don't think that every person will learn how to use the software, because they won't
- Be prepared to train staff in the use of the software
- Ensure you have an induction process for new staff, they will need training
- Consider employing an independent and qualified mediator to assist you in the selection of the software.

# INTEGRATION WITH OTHER CORPORATE SYSTEMS

- Project Planning and Scheduling software may import from or export to other corporate systems such as scoping, estimating, time sheeting, accounting and earned value
- When two or more corporate systems are to be integrated it is important to clearly identify what data is to be imported and exported.

# INTEGRATION WITH OTHER CORPORATE SYSTEMS CONTINUED

- Project Schedules are updated on a regular basis
- Normally a schedule is updated once a week or once a month
  - It is better not to have a live link from systems outside the planning and scheduling software as costs and hours change each time a schedule is opened
  - It is better to update costs from accounting system and hours from a time sheeting systems after the timing aspects of a schedule has been updated and the actual costs and hours are then imported for the immediate past period.



# INTEGRATION WITH OTHER CORPORATE SYSTEMS CONTINUED

- The full integration to other corporate systems is very expensive and there are less expensive options that should be considered especially if there are not very many projects being updated each month. These options include:
  - Importing summary data and not all the detail
  - Manually typing in summary data from reports run on the other system
  - Not importing time and costs data at all and completing the comparison on another system on in a spreadsheet.

# PROCEDURES & WORK INSTRUCTIONS

- It is extremely important to write procedures and work instructions for operators, they serve several purposes
  - The development of the documentation allows critical analysis of the processes and confirms that they may be handed over to other people
  - The procedures assist in the training of personnel
  - The procedures in handover of the system to new project personnel
  - Should a person be unavailable the work may more easily be taken over by another person
- This is particularly important if there are a few specialised operators of the software.

# PILOT & IMPLEMENTATION

- The full implementation of software should be preceded by a pilot to ensure the software meets the needs of the company
- It is important that the pilot is not a just a technical pilot of the software but a project management pilot of the software
- The cost of maintaining and running the system in the long term should be considered
- The pilot should be run on a real project with real data and not a dummy project in a test environment. You need to get real project people involved to ensure the software is capable of delivering the needs of the organisation.

# IMPLEMENTATION, USER SELECTION & TRAINING

- The selection of users is very important. The following situation has been observed by the author:
  - Software companies will sell software and claim that every one should be trained in the software
  - This results in the requirement for the training of a large number of users
  - A majority of the newly trained users will not master the use of the software and resent being forced to use software which they consider not their core business
  - Finally the software fails in its implementation.

# IMPLEMENTATION, USER SELECTION & TRAINING CONTINUED

- To prevent the failing of an implementation is suggested:
  - Create a Project Office whose responsibility is the running and support of the scheduling software
  - Select a small number of users who are interested in using the software who will operate from the Project Office
  - The company trains these people to a high level of competency and they are then specialist people who support one or more project teams.

# POST IMPLEMENTATION REVIEW

- A post implementation must be undertaken to ensure the objectives for selecting and implementing are achieved
- If they have not then the method of implementing should be reviewed and if necessary re-implement the software or terminate its use.

# GOLDEN RULES

- Ensure the software will meet your organisations needs, not just the IT department
- Don't just accept the software vendors proposal, you may often manage with less licenses and training than their recommendation
- Many people will never be able to use the software or will never want to use it
- Always talk to as many other users of the software, especially the ex-users and find out why they have ceased using the software
- Ensure you understand the full cost of maintaining and operating the software.

# FURTHER INFORMATION

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