VERACROSS®

# TRANSITIONING SYSTEMS

*Best Practices for Managing People and Processes*

# PLANNING FOR SUCCESS

## PHASE 1: **PLANNING**

- Thinking/Discussing
- Pre-Planning/Research
- Budget and Pre-Project Approval from Leadership

## PHASE 3: **IMPLEMENTATION**

- Core Project Team
- Establish Department Champions
- Communication Strategy

# DECISION PROCESS TIMELINE

## PHASE 2: **EVALUATION & SELECTION**

- Committee Formation
- Demos
- Selection/Contract

## PHASE 4: **POST-IMPLEMENTATION**

- Go-Live
- Training
- Launch to School Community

PHASE 1

# PLANNING

## DO

- Define levels of success: individually, departmentally, and for the whole school community.
- List the problems you're trying to solve.
- Be aware of the personalities of key people and departments.
- Write out a timeline.
- Think through other factors, e.g., new leadership, events, etc.

## DON'T

- Feel like you have to write an RFP. It can be helpful, but it's not a requirement. An RFP should be a guide to the decision process, not a list of static features; tech changes too fast.
- Be afraid to have conversations with vendors. Be up front with them and tell them where you are in the process. Help them help you.
- Jump too fast. Let the process work in its own time.

PHASE 2

# EVALUATION & SELECTION

## DO

- Select members of an overall change leadership team.
- Specify a small group of people responsible for leading the project. They should be trusted people ideally from different departments who are quick learners, good with tech, and have good attitudes.
- Clarify leadership team responsibilities, e.g., cheerleading, communicating, etc.
- Assign a point person within each department to act as a resource during transitions.
- Set expectations — the change process is going to be hard!

## DON'T

- Try to do it by yourself or think that success is dependent solely upon you.
- Shy away from people who don't like the decision. Work to incorporate them into the process and win them over.
- Start and Stop. You need to build momentum.

PHASE 3

# IMPLEMENTATION

## DO

- Communicate, Communicate, Communicate!
- Build communication plans for each key constituency (parents, students, faculty, staff).
- Create tools that people can trust to find information (i.e., a blog, email newsletter).
- Train abundantly!
- Provide channels for support within departments and with tech office.
- Give extra attention to teachers, parents, and students to help them learn the system.

## DON'T

- Take a hands-off approach with each department. The tech office needs to be the main facilitator of conversations and change.
- Do people's job for them. However, check in regularly!
- Assume that people get the big picture. Tell the story and retell, retell, retell!

PHASE 4

# POST-IMPLEMENTATION

## DO

- Remind people why you changed.
- Reinforce positive changes that replaced the old challenges.
- Continue to be the champion and facilitator.
- Give new hires training with context and history for how the school got to where it is.
- Hold a transition debrief: Were we successful in achieving our goals? To what degree?

## DON'T

- Assume people are "okay." Create ways for people to communicate frustrations/needs.
- Be afraid to have conversations with vendors about follow up questions or new challenges.

# OTHER HELPFUL TIPS

- Think big: calendars, events, business process, etc., beyond what you are currently doing.
- Give space for flexibility and allow expectations, business processes, and requirements to change.
- Remember, new technology is the main driver of change.
- Be transparent — it builds trust!
- Send weekly summaries of project updates.
- Hold monthly or quarterly gathering of department heads to discuss data processes and flows.
- Hold monthly gathering of administrative assistants to collaborate and problem solve.
- Encourage and promote personalized learning for your stakeholders via videos, documentation, extra web training from vendors, etc.
- Training: more, more, more!