

Our guide to managing a successful upgrade

Experienced project manager, Tom Jordan (BSc (hons), MBCS, CITP), explains that moving to Agresso v55 isn't as daunting as you may think. Read his paper for advice on managing a successful upgrade.

DON'T FRIGHTEN THE CUSTOMERS!

Some years ago, when Agresso Business World (ABW) 5.5 was first released, I can remember listening to an Agresso senior consultant extolling the virtues of the new release. Having heard about all the new features and rich functionality offered, I questioned that perhaps ABW 5.5 should more correctly be called ABW 6.

"Ah, but we don't want to frighten our customers away from upgrading" was the response.

Well, despite the fact that ABW 5.5 has been available for several years, it would seem that there's still a large number of UK sites who've not yet taken the decision to move away from ABW 5.4 (or even earlier versions).

Frightened? Probably not: your current version most likely provides all, or most, of the functionality that you need to operate on a day to day basis, and under the current tight economic conditions it's expenditure for another time.

However, even if the rich functionality of ABW 5.5 doesn't tempt you, with ABW 5.6 now out – perhaps now's the time to start planning your upgrade.

Why now? With the release of ABW 5.6, it is likely that support for ABW 5.4 will start to be withdrawn, and whilst a few sites may wish to take the risk of running their business on an unsupported release, most of you will not.

WHAT ARE MY CHOICES?

So, the first question to ask is: what version should you to upgrade to? Do you go now to ABW 5.5 or ABW 5.6?

This is a complex question, and there is no one correct answer. The answer will vary from site to site, but in coming to a decision you should consider your specific implementation.

What our clients say about us:

"Using an Integra project manager instilled a greater feeling of confidence and control in our project. He combined his strong leadership with a keen understanding of the challenges and issues that we faced.

I believe his project management skills and knowledge of Agresso were critical in ensuring the smooth progress and success of our project."

Howard Crowter-Jones
MARS Project Business Co-ordination
Manager University of Bath

"Integra played an important role in our Agresso 5.5 upgrade and in our wider project of functional improvements.

They provided knowledge of 5.5 functional differences, understanding of the 5.5 upgrade process and expertise in Agresso design and usage in general."

Stephen Spencer
Project manager - Detica

How Integra can help you

Integra's project management is based upon sound principles and methodology. We have a proven approach to project management based on the experience of having managed many upgrades. We have broken down the process into the stages and tasks that you need to take so you won't have to start from scratch and can use our experience to ensure a low risk and efficient upgrade process

Integra can provide a full range of upgrade services, including:

- *An assessment of the business benefits your organisation can gain from version 5.5*
- *Project management*
- *Application consultancy*
- *Business analysis*
- *Testing*
- *Installation and data migration*

So, in relation to your specific implementation:

- how you use Agresso
- numbers of users
- timing in relation to your financial year
- availability of resource
- what problems you may be currently experiencing
- whether you wish to review business processes
- whether you want to introduce new functionality
- whether the functionality you need is in ABW 5.5 or ABW 5.6

Some things to consider in respect of Agresso and ABW:

- the latest release of ABW – version 5.5.3 – is considered a stable release and is available now
- historically, the first release of a new software version of is not without problems, can you take this risk?
- With the release of ABW 5.6 it is probable that support for ABW 5.4 will start to be withdrawn and it is likely there will be a clamour to upgrade

Perhaps the key point above is the last one. Do you want to be one of many sites all upgrading at the same time and competing for what is likely to be scarce consultancy resource?

DEFINE THE SCOPE

Once you have made your decision, it is vitally important to define “the project” so that everyone is clear about what you are trying to achieve, by when, who is involved and what their roles and responsibilities will be.

First of all, be clear about what you are trying to achieve: are you moving forward on a like for like basis or do you want to implement new or improved functionality? Document your decision, and the functionality you aim to implement. (This may change during the course of the project as you understand more about ABW 5.5, but you need to have a reference point.)

Tom Jordan

Having been a project manager for more than 20 years, Tom certainly has a wealth of experience to draw on. Before working with Integra, he spent many years working for Fraser Williams, the original UK distributor of Agresso, and managed his first Agresso implementation in 1993.

Since then he has managed many new implementations and upgrades to Agresso and has worked with a variety of organisations encompassing manufacturing, distribution and service industries in the private sector, as well as both local and central government bodies. Organisations such as the Bank of England, Hammerson plc, the House of Lords and Scottish Prison Services have benefited from his experience.

- BSc (Hons)
- MBCS CITP

You should also define the business benefits the project will deliver, even if it's as straightforward as "to be on a supported version of ABW." In setting out the benefits, you should also consider how you will measure if they have been achieved.

As important as the above is the definition of project roles and responsibilities: being clear about who has what responsibility for decision making, for reviewing functionality, testing, training and other activities.

We would recommend that all of the above, and other important information such as the reporting structure, communication planning, change management procedures, and so on, should be set out in a Project Initiation Document (PID), produced and owned by the Project Manager.

CREATE THE PLAN

Whilst moving from ABW 5.4 to either ABW 5.5 or 5.6 is not as major a project as your initial implementation of Agresso, it should not be considered a minor upgrade, and the project will require an amount of time and effort from both internal and external resource. This time and effort needs to be planned and scheduled.

The PID will set out broad timescales, but if the project is to have a means of monitoring progress, and for everyone to know what to do, and when, you will need a detailed project plan. We would recommend that this be produced using a proprietary project management tool such as MS Project.

One of the key considerations when constructing a project plan is the availability of resource (both internal and external):

- in an ideal world, internal resource would be allocated full time to the project, but this very rarely happens. Most project team members still have "the day job," or at least part of it, and project timescales need to be set with this in mind
- external resource – consultants mainly – will have varying demands on their time from other Agresso sites, so early scheduling of activities involving external resources is advised – particularly if you leave the update to the last minute

When creating the plan, allow appropriate time for reviewing all the new features and facilities available in ABW 5.5, and time thereafter for design and configuration, any build work that may need to take place, project team and user testing and end-user training.

Also take into account any month-end or other business driven activities that may affect the project, public and staff holidays, and allow some contingency time.

MANAGE THE PROJECT

As important as choosing the right members of staff for the project team, is getting the right project manager.

And you do need a project manager. Projects that are not managed will fail.

According to the British Computer Society, "only one in eight information technology projects can be considered truly successful." So therefore seven out of eight fail in some way: exceed budget, don't deliver on time, or in some cases just don't deliver!

One of the key reasons for failure? Inadequately trained or inexperienced project managers.

Whilst your project team will come from within the business - because that's where the business knowledge is - you probably do not have the skills within your organisation necessary to resource this role. You may just not have the project management skills required, or you may have project managers who are not experienced in this specific type of project and who will need some support.

We would therefore recommend that you give serious consideration to using the services of an experienced external project manager to manage your project.

THINKING OF UPGRADING?

Call Integra and talk directly to our consultants for impartial and independent advice.

Most recently Tom has managed or supported ABW 5.5.3 projects with:

- *Trinity Laban - upgrade from ABW 545 to ABW 553*
- *Goldsmiths University - upgrade from ABW 545 to ABW 553*
- *Ipswich Borough Council - full life-cycle ABW implementation*
- *Gedling Borough Council - upgrade to ABW 5.5.3*
- *Royal Marsden Hospital - upgrade from ABW 5.4 to ABW 5.5*
- *University of Bath - implementation of ABW followed by upgrade to ABW 5.5.3*

Please contact us for further information on how we could assist your organisation with an Agresso upgrade, or with a new implementation. We are always pleased to discuss your requirements on an informal, no obligation basis.