



## ***Organizing Your Project Team***

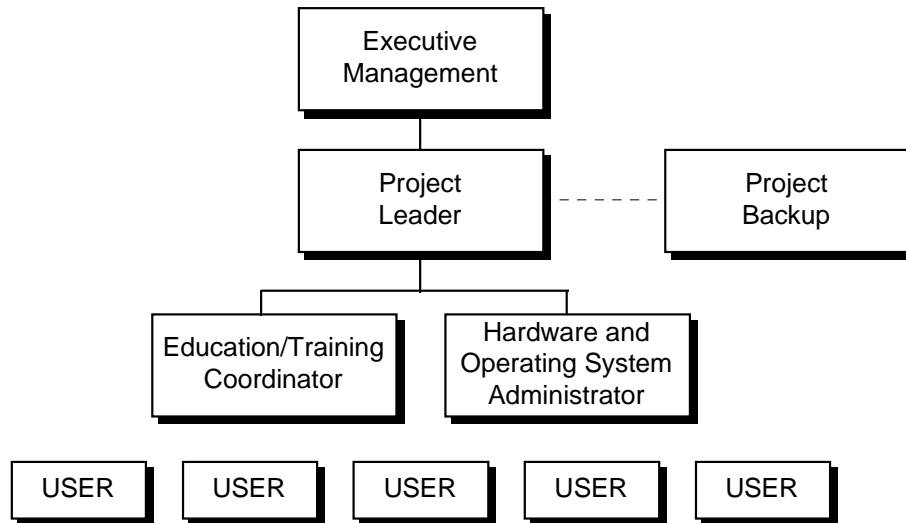
**Requirements, Roles and Descriptions**

## Using The Organizing Your Project Team

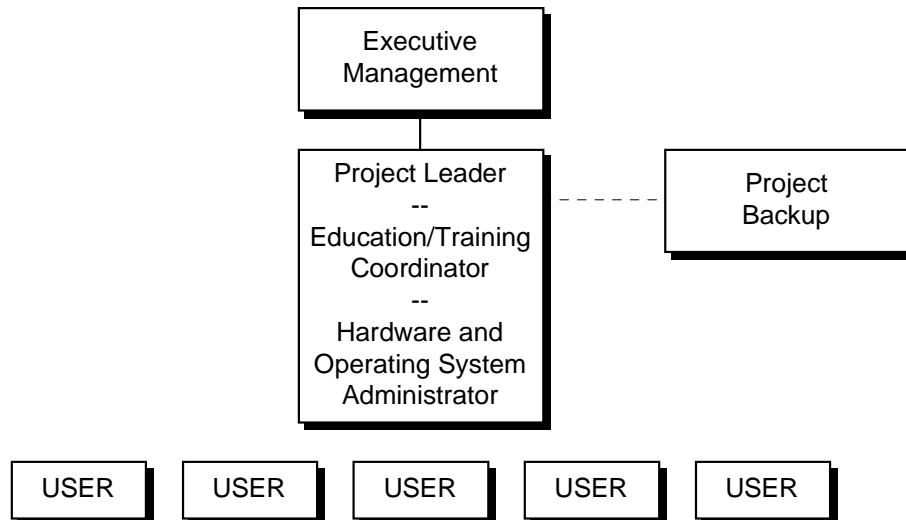
<b>Completed by:</b>	Executive Management and/or Project Leader
<b>Purpose:</b>	To provide a guide for selecting and organizing the members of the customer's FACTS Implementation Project Team and establishing their responsibilities and objectives.
<b>How it is used:</b>	<p>Review Organizing Your Project Team in preparation for the Project Strategy Meeting. In this meeting, the team members' roles and responsibilities are discussed and the members of the team are finalized.</p> <p>You should also complete the FACTS User List (white areas only). This list familiarizes the local FACTS office with the users' roles and experience level. During Delivery and Setup, the local FACTS office records the users sign-ons in the gray areas of the form.</p>
<b>When it is used:</b>	During Project Strategy and Delivery and Setup
<b>Who uses it:</b>	Local FACTS Office
<b>File under:</b>	Planning/Project Strategy
<b>Last revised:</b>	05/01
<b>File:</b>	<p>Organizing Project Team.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

# Sample Company Implementation Project Organization

## SCENARIO I



## SCENARIO II



# Executive Management

Name: \_\_\_\_\_

## Description:

This individual will have the overall responsibility and accountability for the new computer system including the guidance, support and direction through the Implementation Project and after going live with the new system. While it is not possible to control change, it is possible to manage it! Executive sponsorship is *key* and is the most important ingredient to a successful implementation. Management must demonstrate commitment to the project and provide overall leadership.

## Qualifications:

- Must be owner, president, partner, or vice-president who is responsible for the company's revenues, expenses and profit
- Must have direct management authority over the Project Leader and team members
- Must have full accountability to the success of the implementation project

## Responsibilities:

- Meet regularly with your Project Leader and FACTS Implementation Consultant to review project status, resolve open issues, and provide overall project direction
- Obtain user buy-in by empowering your employees as owners of the new system
- Stress and support the importance of education/training during the implementation, the first month of live processing, and periodically after the system is installed
- Take a positive, firm stance when there is resistance to change (See Gordon Graham's Distribution Inventory Management, Chapter 4, page 50)
- Inform vendors and customers that you are making a significant investment to improve service by installing a new computer system
- If custom modifications must be made, try to limit them to those modifications that are critical to the operations of the business. Wait until the system is live for three (3) months before making additional modifications. (Marge Yonda-Distribution Specialist)

## After Going Live:

Executive management should continue to advocate the new system to ensure that it is effectively utilized. Management should stay apprised of new enhancements/releases as well as additional add-on modules and third-party products that are available. Management should attend the bi-annual Software Solutions' Customer Conference.

# Project Leader

Name: \_\_\_\_\_

## Description:

This individual will have the responsibility for the implementation of FACTS, as well as coordinating the installation of all hardware at the Customer site. This role is critical to the success of the implementation and installation project. The Project Leader will be the main coordinator in working with the FACTS Implementation Consultant, internal resources, outside vendors, and executive management.

(S)he will assist the FACTS Implementation Consultant in developing a tailored implementation plan and will work with the necessary company resources (key department managers, key users, accountant, etc.) to accomplish all tasks outlined. (S)he will also act as a liaison to the executive management until the system is fully operational. (S)he will continually apprise executive management on how the project plan is progressing, where roadblocks or any open issues have developed, and where executive management must apply special pressure to progress with the plan. Serious consideration should be made to the time involved in this role. It requires a *full-time* company paid employee.

## Qualifications:

- Must have a thorough knowledge of company and all department policies and procedures
- Solid understanding of financial applications and the distribution industry is key
- Must possess good management skills to delegate, coordinate, and monitor people, events and tasks
- Follow-up abilities are required to keep project on track
- Organizational skills are instrumental to the success of the implementation
- Must be empowered to make decisions and communicate effectively to team members
- Should possess an optimistic but realistic attitude

## Responsibilities:

- Responsible for the overall implementation of FACTS
- Responsible for co-developing the Implementation Project Plan with the FACTS Implementation Consultant
- Responsible for execution, monitoring and follow-up of the implementation plan
- Responsible for regularly communicating the progress of the project to executive management
- Work with the Training Coordinator on information needed for training classes
- Work with the System Administrator with the actual installation of hardware and software, data conversion requirements, backup, security, troubleshooting, etc.
- Communicate and work with the Local FACTS Office Implementation Team on various phases of the project

## After Going Live:

This role evolves into a System Manager position, which involves the day-to-day administrative tasks that keep the system running smoothly.

# Project Leader Backup

Name: \_\_\_\_\_

## Description:

This individual will have the responsibility for backing up the Project Leader during the Implementation project and after going live with the new system. It is important to identify an individual who can be cross-trained on the new computer system to ensure the system runs smoothly on a day-to-day basis if the Project Leader is absent.

## Qualifications:

- Familiar with company and all department policies and procedures
- Possess good teamwork skills as you work with the Project Leader, FACTS Implementation Consultant, and other key users
- Solid organizational skills
- Should have an optimistic but realistic attitude

## Responsibilities:

- Fill in (full-time) for the Project Leader when (s)he is absent
- Be a participant in all implementation planning meetings
- Keep apprised of the Implementation Plan and the current status
- Understand all areas of responsibilities of the Project Leader role

## After Going Live:

This role will continue after the system has gone live. There will always be a need for a backup System Manager.

# Hardware and Operating System System Administrator

Name: \_\_\_\_\_

## Description:

This individual will have the responsibility for site preparation including all electrical, cabling, ventilation, etc. requirements; the physical setup of the computer system including all I/O equipment, UPS, etc., and continued support of both hardware and software. This individual may also assist in the data conversion and custom modifications, as it relates to the existing files and database.

## Qualifications:

- Some UNIX, AIX, or Windows NT background is desired (dependent upon Customer's Operating System)
- Must be detailed, organized, and technical in nature
- A good understanding of hardware installations and support
- A good understanding of existing file structures on the old system

## Responsibilities:

- Site preparation
- Hardware and software setup and installation (loading of operating system, language, etc.)
- UNIX, AIX, or Windows NT and FACTS security setup including log-ins and passwords
- Daily backups and maintenance of backup offsite
- Troubleshooting and resolution of all hardware and operating system issues
- Upgrading the operating system, language, and FACTS to the recent release
- Assist in data conversion:      mapping  
   media transfer  
   testing
- Assist local FACTS office programmer with understanding of existing modifications, file layouts, documentation, etc.

## After Going Live:

This role will continue after the system is installed and live.

# Education and Training Coordinator

Name: \_\_\_\_\_

## Description:

This individual will have the responsibility for coordinating, attending and providing education and training to all employees in respective departments within your company. This role is integral to the success of the initial installation of the computer system, as well as the on-going education/training as new people come on board, new software releases are installed, new modules and third-party products are purchased, and custom modifications are made to your system.

This person will also be responsible for working with the FACTS Implementation Consultant, Project Leader, and key users in developing a Policies and Procedures Handbook. This handbook bridges the gap between how your company operates and the feature/functionality of the software.

## Qualifications:

- Good written and oral skills
- Enjoys working with all levels of employees in a training role
- Needs to understand your business operations and how the new software will operate in your environment

## Responsibilities:

- Responsible for coordinating the employees who should attend FACTS training classes
- Responsible for designing a training program and continued follow-up on the progress of each department or remote site
- Responsible for continuing education of new employees, new application modules, new third-party products, new release levels, new procedures, etc.
- Assist the Project Leader with the Policy and Procedures Handbook

## After Going Live:

This role will continue after going live with the new system. This individual should attend advanced classes as well as new release classes to stay current with the software.



## FACTS User List

Company Name: \_\_\_\_\_

### Description:

Users are the employees who will utilize FACTS on a day-to-day basis. This includes order entry personnel, accounting personnel, warehouse personnel, administrative personnel, management, or any others who will use the system for inquiry or entry purposes.

Please list all the employees in your company who will be using FACTS.

User Name	Company Role / Dept.	*System Role	**Experience Level	O/S Sign-On	FACTS Sign-on	FACTS Security
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						
14.						
15.						
16.						
17.						
18.						

\* **System Role:** Executive Management, Project Leader, Project Backup, System Administrator, Education Coordinator

\*\* **Experience Level:** 1 - 10 (1 = very new to system and applications 10 = very experienced on computers and applications )  
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User Name	Company Role / Dept.	*System Role	**Experience Level	O/S Sign-On	FACTS Sign-on	FACTS Security
19.						
20.						
21.						
22.						
23.						
24.						
25.						
26.						
27.						
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29.						
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31.						
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35.						
36.						

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