SIEBEL.7
eBusiness

PLANNING A SUCCESSFUL SIEBEL IMPLEMENTATION

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Introduction and Overview

This guide provides an overview of how to successfully implement your Siebel software by following best practices guidelines on planning and managing process change within your organization.

Many people of various titles are required to be involved in your Siebel implementation. This book intended for:

■ Executive sponsors

■ Business and IT sponsors

■ Project team members

■ Other project team members who want to understand the stages of an implementation

Additional Resources

The following Siebel guides may contain information relevant to planning your Siebel implementation:

- *Siebel Business Process Implementation Guide*

- *Siebel Cross-Industry Business Process Guide*

- *Developing and Deploying Siebel eBusiness Applications*

- *Planning a Siebel Upgrade*

Siebel Implementation Overview

The implementation of Siebel applications is far more than the replacement of one technology solution with another. It is an opportunity for change and a chance to identify and improve upon the processes that lead to business benefits and drive your organization's business success.

Siebel Systems, through its experience with over 3,500 Siebel initiatives, has learned that the companies with the most successful implementations approach them as a complete business strategy, in which people, processes, and technology are all organized around delivering value to their customers. Siebel implementation success critically depends on following implementation best practices:

1 **Establish measurable business objectives.** You should define the specific business results you want to achieve through the implementation of your Siebel application. Establishing your business objectives helps keep your Siebel implementation on track. Measurable business objectives help you quantify and understand the benefits of your Siebel solution.

2 **Align your organization.** You want to align your executives, managers, and users to a single vision, set clear expectations for the required changes, and identify performance metrics for your implementation. It is very important that prior to the start of the Siebel implementation your organization is aligned around the your Siebel implementation solution.

3 **Develop an implementation strategic plan.** An implementation strategic plan is the framework from which you link people, process, and technology together. It defines the project goals, develops a strategy for achieving these goals, explains how the application supports the strategy, and ensures value for the users.

4 **Establish program management.** A strong program management team and methodology is important to the success of your Siebel implementation. You want the best leaders in your organization to be part of your program management. Establishing the decision-making rules up front and identifying the roles, responsibilities, and metrics to manage the implementation provides the framework that guides and supports your Siebel implementation.

5 **Develop a user-adoption strategy.** How well your users adopt the new Siebel application and use it in the way intended directly affects return on investment. Developing a strategy to affect user adoption early on in your implementation saves you retraining costs down the line.

6 **Phase the implementation.** Due to its complex business strategy, implementation is best achieved when carried out over phases. A phased approach allows you to achieve results quickly from your Siebel implementation and to improve upon future phases by leveraging lessons learned in earlier ones.

7 **Train users.** The development of a comprehensive training plan for your Siebel implementation assists you in achieving higher rates of user adoption. Your users need to learn the new Siebel application as well as the business processes associated with it. Training should be role-based and ongoing.

8 **Monitor progress.** Once you have implemented your Siebel application you must monitor, measure, and track your system's results. The results you obtain will help you to continuously improve your system and the system's use.

In summary, the complete implementation of a software system can appear to be complex. But the key to success is not complex; it is careful adherence to the best practices described in this book. These best practices that have been developed over more than 10 years of product market experience and many successful implementations.

The primary focus of this book is the importance of planning, as discussed in Chapter 1, "Establish Vision and Business Objectives," Chapter 2, "Align the Organization," Chapter 3, "Develop the Implementation Strategic Plan," and Chapter 5, "Develop a User-Adoption Strategy." This book also discusses implementation concerns in Chapter 6, "Phase the Implementation" and Chapter 7, "Train Users." Lastly, this book discusses the importance of sustaining your success in Chapter 8, "Measure Progress."

Figure 1 illustrates components of a successful implementation. Each of these components is discussed in this book.

Plan | **Implement** | **Sustain**

1 Establish Vision and Business Objectives

2 Align the Organization

3 Develop the Implementation Strategic Plan

4 Establish Program Management

5 Develop a User-Adoption Strategy

6 Phase the Implementation

7 Train Users

8 Measure Progress
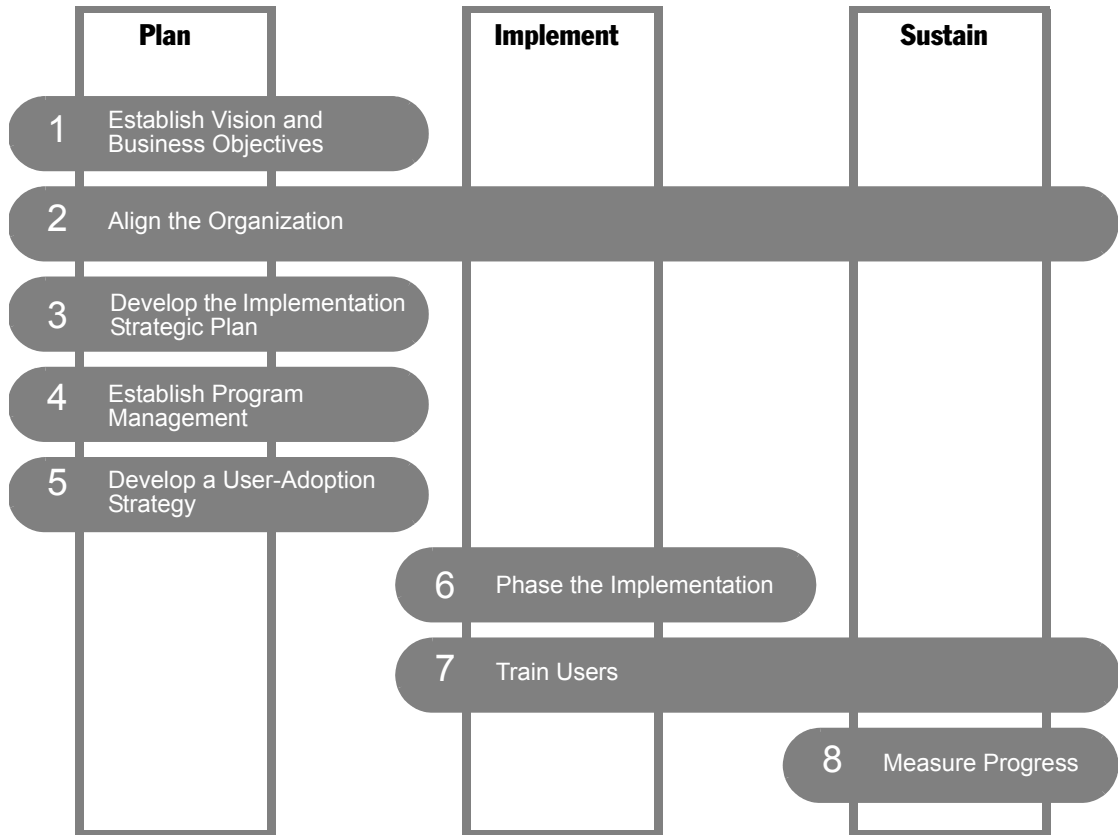
Figure 1. Components of a Successful Siebel Implementation

Establish Vision and Business Objectives 1

This chapter discusses the importance of establishing an articulate vision and measurable business objectives for your Siebel implementation.

1 Establish Vision and Business Objectives	*An articulate vision and clear, communicated business objectives are key to success.*
2 Align the Organization	Best Practices for Establishing Business Objectives:
3 Develop the Implementation Strategic Plan	■ Establish the Vision for Your Implementation on page 17
4 Establish Program Management	■ Make Sure That Business Objectives Are Measurable on page 18
5 Develop a User-Adoption Strategy	■ Define Metrics for Measuring Against a Baseline on page 19
6 Phase the Implementation	■ Communicate the Vision and Business Objectives on page 21
7 Train Users	Review the Checklist on page 23 before starting the next step.
8 Measure Progress	

What Is the Vision?

The vision is the overall reason you are implementing your Siebel solution and is linked to your business strategy. Your vision should align with the corporate mission and vision. The implementation of the Siebel solution should be viewed as a major catalyst in achieving the corporate vision.

What Are Business Objectives?

Business objectives are derived directly from the vision you have for your Siebel solution. Business objectives describe a desired end-state that the company hopes to achieve in response to business drivers. They define in detail what you want your business to achieve with your Siebel implementation. They are not a generic wish list—business objectives must be specific, measurable, and achievable.

Once you have drafted your business objectives, map them back to your vision to check that your business reasons for implementing Siebel will be met.

Why Are Vision and Business Objectives Important?

Establishing your vision for your Siebel implementation is important because it clearly links your Siebel implementation vision with your corporate mission. You achieve better business results if you keep your Siebel implementation vision aligned with your corporate mission ensuring that your desired business results are aligned with the overall vision.

Establishing measurable business objectives helps to keep your Siebel implementation within the determined scope of the project and allow you to measure success.

Figure 2 illustrates how business objectives are derived from your vision and business strategy and how they are the thread that links the whole implementation.
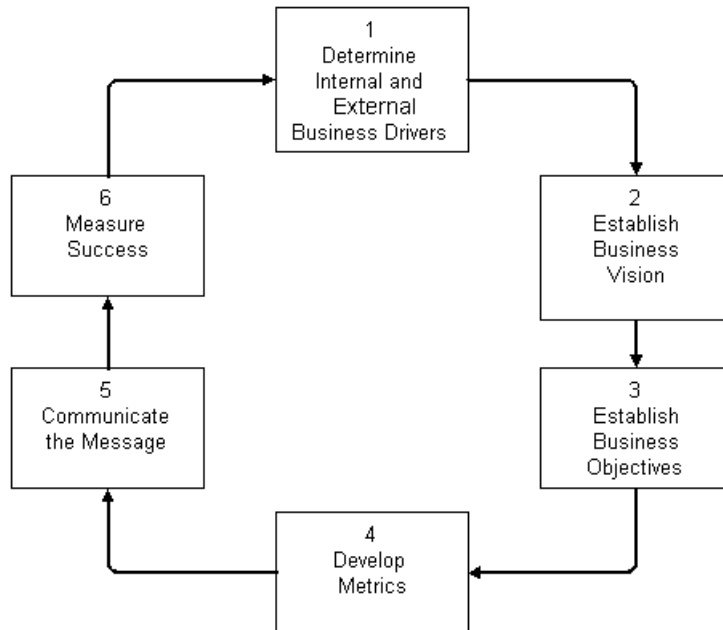
Figure 2. Deriving Measurable Business Objectives

Successful implementations always begin with a clear vision and precise objectives. It is important to put these in place to best achieve a positive return on investment.

Best Practices for Establishing Business Objectives

When defining your business objectives, consider the following best-practice guidelines:

- Establish a clear vision for your Siebel implementation in relation to business drivers

- Make sure that business objectives are specific, measurable, and achievable

- Define metrics for measuring performance against baselines

- Communicate your vision and business objectives across the organization

Each best practice is described on the following pages.

Establish the Vision for Your Implementation

Your organization's vision for the implementation should address how using Siebel applications supports ongoing organizational goals. When establishing your vision, consider these questions: What were the critical business issues that prompted you to purchase the Siebel application? What does your organization hope to achieve?

The vision of your Siebel implementation is highly dependent on the business pain-points, challenges, hurdles, and issues you are trying to address. The following are a few examples of what may be driving your need to implement Siebel applications:

■ Your customers are unhappy with the way they are treated when they interact with your organization through your call-center agent, field sales or service representatives, Web site, or partners

■ Your employees' activities are not customer-centric and therefore are ineffective in achieving your CRM objectives

■ Your partners feel that they don't have the information they need to truly act as an extension of your organization

■ Your call-center operations cost 200% more than the industry average

■ Your revenue per sales representative is 50% lower than the industry average

■ Your marketing, sales, and service functions don't share a common view of the customer

■ Your market share is being eroded by entry of new and more nimble competitors

■ New legalization has opened new markets to your business

Example

A medical instrument company rolled out a Siebel eBusiness solution to its sales representatives. The company defined a vision that was easy to understand and easy to articulate: to retain and acquire more customers. To achieve this vision, the company used the Siebel application to consolidate global call centers so that all used standardized and consistent processes for call handling, complaint investigations, and complaint reporting.

Because of the clear vision established from the beginning, the many levels of the organization were aware of the "why" for the Siebel implementation and understood and supported the solution.

Make Sure That Business Objectives Are Measurable

Review your vision for the Siebel implementation, and then think about what you want your business to accomplish with your Siebel implementation. Do you want to increase revenue? Do you want to improve customer retention rates? The answers to these questions become the basis for your business objectives. Refer back to the selection process for your Siebel application, what were the ROI (return on investment) targets? For example, do you want to decrease costs, or increase productivity?

Make sure that your business objectives are specific and measurable such as "Reduce technical support response times by 20 percent" rather than "Improve technical support."

Make sure that you set realistic objectives. Your objectives need to be achievable so that your users will buy into achieving them. If you set the bar too high, no one will want to strive toward the objective.

Consider creating a hierarchy of business objectives, organized by business unit. This allows each business unit to establish *how* it will achieve its measurable business goals—which are linked to the overall business objectives. This way each business unit owns a part of the success of your implementation.

It is also important to make your objective time-bound. This helps you to define realistic objectives that lead to results. Clear, time-bound objectives make it easier to build upon successes in each phase of your implementation. Achieving results bolsters confidence in your system and adds to a rapid receipt of ROI.

Examples

These are some examples of business objectives:

- Reduce technical response time by 20% over a three-month period

- Increase forecasting accuracy by 15% during the first quarter

These are *not* business objectives:

- Implement CRM

- Replace a legacy system

- Improve technical support

Define Metrics for Measuring Against a Baseline

To get to your desired end-state, you need to determine and then track specific metrics to gauge your progress towards meeting your business objectives. If you take a snap-shot view of how successful your implementation has been only at the end, you may risk being displeased with the results.

For example, you are deploying Siebel Sales and one of your business objectives is to increase the sales close rate by 15% in 12 months. In order to measure post-rollout improvement, you need to establish a baseline of accurate close rates for your current (pre-implementation) sales process.

Careful definition of metrics and accurate baselining before rollout is critical for measuring the effectiveness of your implementation. There are other metrics that you need to measure as part your implementation, such as metrics that measure user adoption (Chapter 5, "Develop a User-Adoption Strategy") and metrics that measure leading indicators to give you early warning of potential problems (Chapter 8, "Measure Progress").

The actual metrics most applicable to your business situation depend on your unique business objectives. However, Table 1 lists some revenue- and cost-related metrics tracked by various types of world-class organizations:

Table 1. Examples of Revenue- and Cost-Related Metrics

Metrics	Marketing	Sales	Call Center and Field Service
Revenue	■ Number of sales leads ■ Lead close rate	■ Number of sales opportunities ■ Sales-focused activity time ■ Sales close rate ■ Partner performance	■ Customer retention rate ■ Inquiry response time ■ Cross-sell and up-sell rates

Table 1. Examples of Revenue- and Cost-Related Metrics

Metrics	Marketing	Sales	Call Center and Field Service
Cost	■ Campaign cycle time ■ Campaign development cost ■ New product cycle time ■ Staff turnover ■ Staff training costs ■ System support costs	■ Sales cycle time ■ Customer acquisition cost ■ Staff turnover ■ Staff training costs ■ System support costs	■ Service cycle time ■ Fulfillment order errors ■ Problem-resolution rate ■ Staff turnover ■ Staff training costs ■ System support costs

Once you have determined what your metrics are, you need to baseline them. Many companies invest millions of dollars in state-of-the-art technology and rightfully expect high results. After rollout, however, these same companies, when probed to show exactly which parts of their operations have improved and by how much, struggle to deliver the numbers. This problem that can be avoided by gathering baseline data prior to the implementation, getting executives to agree on the current state, and then using the baseline to measure future performance and improvement. Consider the following examples, in which companies established a baseline and measured improvement against it:

■ A large European telecommunications company increased revenue per customer by 20%

■ An international computer hardware company cut order processing time by 65%

■ A worldwide financial company improved lead conversions by 50%

■ A leading car manufacturer improved primary customer service metrics by 32%

Communicate the Vision and Business Objectives

Once you have established your vision and business objectives, you must communicate them throughout your company. Don't keep your vision and objectives secret or confined to executives and IT professionals; this creates a disconnect with the groups who are to support the implementation. Once you have established your vision and business objectives, share that vision broadly.

When communicating your message consider the different reasons why those in your organization need to understand the vision and business objectives:

- The IT professionals need to understand *what* you want to accomplish, so that they can develop the best implementation approach and identify configurations that are necessary to bring about the desired results. Communicating the vision and business objectives helps your project team to focus the project scope and prioritize implementation decisions.

- Executives need to understand *why* the change is needed so that they can provide a business-centric, implementation strategic plan for business units.

- Managers use business objectives to understand the value of the new system early in the process and to communicate the benefits to users.

Lack of clarity in your vision statement can lead to user confusion. For example, one company issued a vision statement to "Improve the ability of our call centers to operate at a lower cost." The users interpreted this to mean "we are making significant job cuts" and went on strike. The reality was that the company had no intention of reducing the workforce: it wanted to increase call center efficiency to keep up with increasing call volumes.

To achieve the desired results for your Siebel solution, you need to have everyone focused on and supportive of the objectives. Workshops can be used as forums where the implementation vision is communicated to frontline managers. Workshop participants get the same information at the same time, and feedback is encouraged. Workshops can also help the organization identify areas of resistance and can be used deliver a consistent and positive message.

Newsletters, email announcements, and intranet articles are good methods to broadcast the vision and objectives to the entire user base, as illustrated in the following example.

Example

The CEO of a software company succinctly defined the company's vision for its Siebel application and communicated its vision to employees by email. In the email, the CEO explained why the Siebel application was chosen and what the company expected to achieve from the implementation. The email assured employees that the CEO supported the initiative, was involved in the project, and would expect results from each employee during the rollout of the Siebel application. The CEO's first email was the launch of the communication strategy; it detailed the expected ways the organization would receive communication and provided a forum for feedback. This email was the first of many updates sent to the organization's employees to inform them about project progress and future plans.

As important as communicating the message is encouraging two-way communication. After the initial email announcement was sent, the company set up an intranet site where employees were able to ask questions and post feedback, anonymously if they wished. The company committed to answer any questions within two days of posting.

Checklist

Before going on to the next stage, check that you have completed the following tasks:

❑   Identify at least four measurable business objectives

❑   Rank the business objectives in order of importance to your business

❑   Make sure that objectives are time-bound

❑   Develop metrics for measuring achievement of objectives

Checklist

Align the Organization 2

This chapter discusses the importance of aligning your organization to achieve success with your Siebel implementation.

A successful implementation not only requires alignment with strategy, benefits, and metrics, but also requires alignment between people, process, and technology initiatives. Implementation success requires careful and meticulous coordination across units, functions, and geographies to lead, manage, and monitor change.

1   Establish Vision and Business Objectives

2   Align the Organization

3   Develop the Implementation Strategic Plan

4   Establish Program Management

5   Develop a User-Adoption Strategy

6   Phase the Implementation

7   Train Users

8   Measure Progress

Make sure that executives, IT professionals, managers, and users support the implementation.

Best Practices for Aligning Your Organization:

- Identify and Manage Stakeholders on page 29
- Establish a Change Management Plan on page 31
- Ensure That Your Change Management Plan Is Balanced on page 34
- Make Sure That Managers Understand the Change on page 36

Review the Checklist on page 38 before starting the next step.

What Is Aligning Your Organization?

Aligning your organization means bringing together executives, IT professionals, managers, and users to understand the business objectives and to support the implementation initiative. Alignment also means adjusting your processes, systems, infrastructure, and compensation plans to support the Siebel solution. Alignment is not a one time activity; you need to continually realign your organization throughout the project.

Why Is Aligning the Organization Important?

When your organization is aligned, you can direct your implementation to achieve your business objectives.

For example, it is important to align the people in your organization because:

■ **IT professionals.** Need to understand what you want to accomplish with your implementation so that they can determine the implementation approach and any necessary configurations to bring about those results. This helps to keep your project on budget and on time.

■ **Executives.** Need to know your business objectives so that they understand the need for the changes that Siebel application brings and so that they can communicate those changes to the business units.

■ **Managers and users.** Need to be aligned so that they are receptive to the new system when it is rolled out to them. Managers also are responsible for reinforcing the vision, communicating the project details to the field, and supporting the users at rollout. Aligning of your managers to your Siebel solution is an important element for your success.

Figure 3 summarizes the preparedness of each level of in an aligned organization.

Executives

- Clear vision, objectives, and performance measures
- Hypothesis for improvement in business results
- Active sponsorship of initiative
- Accountable for communicating message

Managers

- Aligned to vision and objectives
- Clear expectations for change
- Accountable for communicating, supporting, and reinforcing
- Measures of frontline performance defined

IT Professionals

- Aligned to vision and objectives
- Active support of initiative
- Clear understanding of how vision maps to Siebel application

Users

- Aligned to vision and objectives
- Desired performance model is clear
- Resistance handled constructively
- Prepared for change

Figure 3. Preparedness in an Aligned Organization

Best Practices for Aligning Your Organization

When aligning your organization, consider the following best practices:

- Identify and manage stakeholders across the enterprise

- Establish a change management plan

- Balance the institution of your change management plan throughout your implementation

- Make sure that managers understand the change

Each best practice is described on the following pages.

Identify and Manage Stakeholders

The first step in aligning your organization is to identify the implementation's key stakeholders.

A stakeholder is a member of your organization who shares responsibility for the success of your Siebel implementation. The choice of key stakeholders should be made carefully because this decision impacts the project. Key to a successful implementation is maintaining project ownership within the business, for example by assigning the achievement of business objectives to stakeholders.

Business Stakeholders

A business stakeholder is typically a representative of the business unit who is impacted by the Siebel implementation, for example the VP of Sales in a CRM implementation. Your business stakeholders need to believe in the new system, and they need to be able to articulate the benefits to the individual business units. As the vision is communicated within the organization, your business and system stakeholders become the Siebel implementation advocates and garner user support.

Each business unit affected by your Siebel implementation needs to understand the business objectives that drive the initiative. The ideal business stakeholder understands the overall business factors that resulted in the Siebel implementation and can list the benefits for the individual business unit.

System Stakeholders

A system stakeholder is typically an IT professional involved in the Siebel implementation, for example the CIO. By understanding the vision, business objectives, and how these map to your Siebel application, your system stakeholders can support process integration and improve system performance.

External Stakeholders

An external stakeholder is someone from outside your company who is involved in the implementation of your Siebel solution. This may be a partner, an outside integrator (such as Siebel Systems, Inc.), or regulators for your company's business (SEC). Regulators impact your implementation because of the requirements they place upon your business, and these requirements need to be taken into consideration while implementing your Siebel solution. External stakeholders need to understand your vision and business objectives.

It is no small feat to manage employees and other project stakeholders so that each contributes favorably to the project outcome. The matrix in Figure 4 provides a guideline to help in this effort. Any stakeholder can be mapped to the matrix based on the stakeholder's level of support for the initiative and on the stakeholder's power to influence the success of the initiative's success. Each quadrant corresponds to a unique strategy for managing and communicating with the stakeholders in that quadrant.

	High	
Power	**Convert** the unsupportive yet powerful stakeholders who resist change.	**Leverage** the powerful and supportive stakeholders who are the critical players for realizing change.
	Manage the unsupportive and less powerful stakeholder to minimize any negative influence they might have.	**Support** in the change effort the less powerful but supportive stakeholders (usually those responsible for maintaining and using the application).
	Low	
	Low **Support** ⟶ High	

Figure 4. Stakeholder Matrix

Managing stakeholders, particularly resistors, can be a delicate process. The act of inspiring change and gaining the support of others often requires winning people over individually. Consequently, effective employee and stakeholder coaching must be part of the change management execution process. People require empathy as they adjust to the changes occurring in the organization and day-to-day roles, and therefore need coaching to adapt to these changes smoothly and quickly. Supervisors, and even a special change management team, should offer ideas, insight, and support throughout the change process.

It is customary for people to resist change, however, one very effective means for getting people to not resist change is to share successes early and often to pacify their fears and overcome their pessimism. To make use of this strategy of sharing, your communication plan should leverage champions, team leads, and opinion leaders as change agents who provide fact-based accounts, personal experiences, and support validating management's position.

Establish a Change Management Plan

Change management is a critical element in achieving success with your implementation. A change management plan outlines how you intend to help users change their behaviors in a way that increases their adoption of the new system. A change management plan is an important component of your user adoption strategy. User adoption strategy is discussed in more detail in Chapter 5, "Develop a User-Adoption Strategy." A formal program of change management facilitates the institutionalization of change by influencing people's feelings, attitudes, and behaviors in a manner that achieves widespread support for a program of change.

Change management consists of six process steps; each process step uses one or more levers of change to fulfill specific change objectives. Levers of change include compensation and reward systems, communications, training, policies and processes, organizational structure, and management behavior.

Change management addresses the soft issues of your Siebel solution. While the issues may be described as soft, they are by no means unimportant and need to be given early and careful attention. Areas you want to address in the development of your change management plan are:

■ **Effective and sustaining sponsorship.** Your change management plan should make sure that sponsorship is visible and ongoing.

■ **The skills and capabilities of the people responsible.** How the people implementing the Siebel solution respond to change and resistance is important in your program. You may consider providing education or training to help people respond positively to change and respond appropiately to resistance.

■ **Areas of resistance and how to manage them.** Pockets of resistance are certain to appear in the course of any implementation. These need to be identified and managed throughout your program. Ignoring resistance (and those who resist) will have a negative impact on your implementation.

■ **Culture of your organization.** Consider how you have implemented other large projects in the past. Have people been receptive? Is there a culture of communication and trust, or does news spread by rumor and gossip? Understanding the culture of your organization is very important, and helps you to address areas of resistance and to develop an appropriate and successful communication plan.

■ **Communication plan**. A key component of a change management plan is the communication plan. Many software implementations fail because they do not address the people factor in the process, and do not recognize that people are uncomfortable with change in general. Bringing people along with clear and consistent communication messaging helps to address this. The communication should be two-way: provide methods for users, managers, and project staff to communicate their concerns back to program management. Plan project processes to handle this feedback, and, as appropriate, communicate it to the entire user community.

Here are some best practices to consider in developing your communication plan:

■ Town hall-style meetings	■ Roadshows
■ Brochures and bulletins	■ Small group discussions
■ Breakfast meetings	■ Informal lunch-and-learn sessions
■ Cross-functional planning retreats	■ Celebration of milestones
■ Employee presentations	■ Exhibitions
■ Formal announcements	■ Hall postings
■ Kiosks	■ Open houses
■ Mail drops and emails to all staff	■ Story boarding
■ TV broadcasts to all staff	■ Broadcast voicemails to all staff

■ **Users as Change Agents**. An effective agent of change can be your users. Early on you want to identify the enthusiastic supporters of the Siebel application. Each of your user groups naturally has opinion leaders who take the lead on new projects and are respected by their peers. Successful implementations identify these opinion leaders early in the implementation process and promote them as agents of change.

Example

A large technology company was experiencing some resistance during the implementation of a Siebel application. The company determined that they needed to involve more of the organization's users in the planning process to generate enthusiasm for the application and the upgrade.

To enhance corporate communications, the company announced an application-naming contest. Users were invited to suggest a name for the application and design a logo. More than 60 users from all levels of the organization submitted entries. The organization also introduced monthly newsletters and a Web site where users could obtain project updates, company news, and share feedback. The contest provided users with a sense of ownership for the application, and the company's willingness to share news and learn from feedback fostered a sense of corporate community and comfort with the implementation.

Ensure That Your Change Management Plan Is Balanced

The extent to which your Siebel solution impacts your front-office employees, activities, and processes determines your change management effort. At different times during your implementation, different stakeholders need to be engaged more heavily than others. You want to make sure that your change management plan is balanced so that correct emphasis is placed on the levers and groups appropriate to the stage of the implementation.

During the initial stages, executive sponsors are required to lead with the vision. Next, IT professionals and business managers are heavily engaged in translating business needs to technology and solution requirements. Then, IT professionals work to design, develop, configure, test, deploy, train, maintain, and upgrade the solution. During the rollout and post-rollout stages, executives and stakeholders need to track progress against business objectives. The framework in the following table identifies key processes and levers to streamline the change effort.

	Levers					
Process	**Compensation/ Rewards**	**Management's Behavior**	**Policies/ Processes**	**Training**	**Communication**	**Organization Structure**
Create Need for Change		●●●		●●	●●●	
Build the Leadership Team	●●●	●●●		●	●●	●●
Set and Communicate Direction		●●●	●●	●●	●●●	●●●
Align Organization	●●●	●●●	●●	●●●	●●●	●●
Lead the Transition		●●●	●	●	●●●	
Determine Need for Next Change		●●●			●●	

Importance of Lever

High	●●●
Medium	●●
Low	●
Not Applicable	

Aligning your organization necessitates a skillful and balanced application of change levers.

Compensation and Rewards. The most direct way to change employees' behaviors and performance is by aligning rewards and compensation to the desired behavior. Examples of compensation and rewards include salary, bonuses, awards, benefits, performance reviews, promotions, praise, and public recognition. Because people do what they are paid to do, providing the right incentives to drive desired behaviors is a critical lever.

Management Behavior. Ultimately, employees do what they see their superiors do. management behavior consists of actions, attitudes, and decisions of a supervisor, manager, or executive that actually supports the publicly communicated message of change. Consequently, the management behavior is a powerful factor influencing employees' perceptions the organization's commitment to change. The behavior and actions of management must manifest values and principles supporting the change. Only when managers "walk the talk" through their daily actions, decisions, and words can a credible message of change be delivered. (This is discussed in more detail in "Make Sure That Managers Understand the Change" on page 36.)

Policies and Processes. Because a change program typically requires modifications to the way a company does business, corresponding changes to the company's policies and processes are usually required. Modifications to policies and processes may span many organizational activities, for example, for the success of your CRM implementation, customer facing employees need documentation and training on policies and processes related to lead assignment and management, proposal development, order management, service delivery, and so on. To ensure quick organizational alignment, these front-office processes need to be integrated to back-end operations like procurement, inventory management, and manufacturing.

Training. Organizational changes can quickly become a traumatic experience for employees if they lack the skills, training, and tools necessary to cope with the ensuing change. Because employees can successfully demonstrate only the skills they have mastered and can accept change only when they feel comfortable with it, well-executed training and development programs are requisite to providing employees the confidence they need to carry out their new tasks. Training is discussed in more detail in Chapter 7, "Train Users."

Communication. Your communication plan should facilitate open and honest exchange of information, providing decision makers with accurate and insightful information from a variety of sources and foster cross-functional collaboration so that best practices and successes are shared with all concerned.

Make Sure That Managers Understand the Change

The managers of your users are some of the most important people for the success of your Siebel implementation. They need to understand the vision and the business objectives of your Siebel implementation. They need to understand and set clear expectations for the change that the Siebel application brings to your organization. They should be held accountable for communicating and supporting the change, and they should measure the performance of the users with the new application.

Communicate frequently with your mangers: highlight managers' progress, share news, and make sure that the message is clear and that project expectations are being communicated.

Your managers need to be brought into the Siebel implementation early so that the communication and expectation-setting with your users is consistent, positive, and realistic. Managers need to reinforce the vision and encourage employees to learn and use the new system. If managers of the business units do not buy into the change, cannot communicate the vision, or do not measure users' performance on the system, their direct reports will not use the system in the way that the system is intended to be used.

Consider holding manager workshops to help your managers understand the vision and business objectives tied to your Siebel implementation. Workshops give your managers a safe environment to address their concerns. Provide your managers with the training they need to use your Siebel application effectively and to be able to mentor and coach their direct reports in its use.

Example

A midsize software company was implementing Siebel Sales to their global sales force. A major reason for implementing the Siebel application was to streamline and improve the forecasting process. The VP of Sales understood this and some of the sales managers also understood, but many of the regional managers had not heard this message and did not understand the importance of improving the forecasting process.

Three months after the implementation of Siebel Sales, only a small fraction of the sales force used it for forecasting while the remainder of the sales force was still using everything from MS Excel spreadsheets to homegrown tools. Clearly the forecasting process had not been improved.

The company then held workshops for the managers to educate them on how to use the new system for forecasting. The workshops emphasized the company's reason for the new process and the importance of following the process. Managers left the workshops understanding the benefits of forecasting. They also knew that they would be expected to use the system themselves and to mentor their direct reports on using the system.

Six months after the implementation of Siebel Sales, the majority of the sales force was using Siebel Sales effectively for forecasting. This allowed the company to gather data on sales opportunities, closed deal time frames, the validity of sales leads, and the success of marketing campaigns that generated leads. The company recognized the importance of bringing the managers along with the message, tools, and training.

Checklist

Before going on to the next stage, check that you have completed the following tasks:

❑ Identify your executive sponsors and confirm that these sponsors can succinctly articulate the Siebel implementation vision

❑ Identify business stakeholders and confirm that they can articulate the key benefits of the Siebel implementation to the user community and will become advocates for the Siebel application

❑ Create a balanced change management plan that includes a two-way communication

❑ Educate your frontline managers about the vision, objectives, and tools for success in managing users

Develop the Implementation Strategic Plan 3

This chapter discusses the importance of developing an implementation strategic plan. Planning is an integral part of any Siebel implementation because it allows you to map your business objectives to your plan and to ensure sponsorship throughout the implementation. The implementation strategic plan will be your guide throughout your implementation.

1	Establish Vision and Business Objectives
2	Align the Organization
3	Develop the Implementation Strategic Plan
4	Establish Program Management
5	Develop a User-Adoption Strategy
6	Phase the Implementation
7	Train Users
8	Measure Progress

Translate your business objectives into a detailed plan, defining business processes and requirements and project goals.

Best Practices for an Implementation Strategic Plan:

- Create a Blueprint That Details Your Plan on page 43
- Define Your Data Management Strategy on page 44
- Map Your Business Processes on page 46
- Identify and Understand Your User Groups on page 49
- Incorporate Best Practices into the Plan on page 51
- Develop a Phased Implementation Approach

Review the Checklist on page 52 before starting the next step.

What Is an Implementation Strategic Plan?

An implementation strategic plan defines the project goals, develops a strategy for achieving these goals, explains how the application supports the strategy, and ensures value for the users. Your implementation strategic plan should address the vision, the business goals, the success metric, and the technology considerations for your implementation. An implementation strategic plan for your Siebel implementation allows you to increase employee, customer, and partner satisfaction through the linking of people, process, and technology. Your implementation strategic plan needs to map out your entire implementation strategy and be bound by realistic time frames.

Strategy is often driven by both internal and external factors:

■ Internal strategy may address areas of concern that directly impact your organization. You may want to consider your company's strengths and weaknesses, its culture, its management leadership, and historical events.

■ External strategy development may consider your competitors' strengths and weaknesses, economic conditions, and government and industry regulations.

Your implementation strategic plan should address both internal and external factors.

When developing your implementation strategic plan, ask the following questions:

■ What are the objectives by each organization and channel?

■ What business processes support these objectives?

■ What processes are specific to a particular channel or industry?

■ Where does the Siebel application functionality support the business processes?

■ Over what time frame do we need to carry out the plan?

Why Is an Implementation Strategic Plan Important?

A well-defined implementation strategic plan is critical to your success and keeps your project's daily occurrences linked to the overall strategic picture. An implementation strategic plan is the detailed framework for your Siebel implementation and establishes how you run and measure your implementation. It guides you through the milestones and benchmarks and helps keep you on budget and within the scope of your business objectives. Your plan should address such topics as customer segmentation, multichannel strategy, mapping your business processes to your application, defining best practices, and mapping them to your application.

Example

A large technology company was implementing a Siebel application as a bug-tracking tool in their engineering department. Their implementation strategic plan was a comprehensive one for all the components of their implementation. It included a project plan that mapped out the phases of the implementation and the tasks and resources associated with phase. The implementation strategic plan also included a detailed analysis of requirements, proposed solutions, level of effort associated with the solution, complexity of the solution, and level of customization required. The implementation strategic plan focused on the measurable business objectives and how the requirements mapped to those. This allowed the company to keep focused on the business reasons for implementing the Siebel application, while developing a well-defined implementation strategic plan to accomplish the implementation.

To obtain and agree upon all the business processes and requirements, the company held several workshops that involved business and IT stakeholders, users, project team members, and executive sponsors. They brainstormed how each of the identified processes fit into the out-of-the-box Siebel application, assessed configuration options and discussed where in the phased implementation each process would produce the best business results.

The early commitment to developing a implementation strategic plan helped to keep the company's Siebel implementation focused and on track.

Best Practices for an Implementation Strategic Plan

When developing an implementation strategic plan, consider the following best practices:

■ Create a blueprint that outlines your plan in detail

■ Define your data management strategy. For example, will you use a centralized strategy or a decentralized (multiple) strategy?

■ Map your business processes to your application

■ Define best practices and map them to your application

■ Identify and understand your user groups

■ Incorporate best practices into the plan

■ Develop a phased implementation approach (see Chapter 6, "Phase the Implementation")

Each best practice is described on the following pages.

Create a Blueprint That Details Your Plan

A blueprint is a comprehensive implementation plan that links technology, processes, and people for the duration of your Siebel implementation. Creating a blueprint for your Siebel implementation is a critical best practice. Follow it to make sure that all areas are addressed in a timely manner. A well thought-out blueprint that involves business, IT, change management, and quality assurance processes will guide your Siebel implementation to success. In creating a blueprint, make sure to include the following:

■ System architecture that is driven by IT and business requirements

■ Data management strategies (See "Define Your Data Management Strategy" on page 44.)

■ Deployment guideline and options

■ Change control process

■ Production support process

■ Global deployment components and architecture options

■ Multiple server layers

■ System architecture deployment strategies: database, application servers, remote servers, Web servers and so on

■ Performance tuning

■ Database

■ System hardware

■ Infrastructure

■ Training plan

■ Project plan or project timeline

■ Management activities, including workshops, training, and messaging

Define Your Data Management Strategy

When developing your implementation strategic plan, define your data management strategy. You need to consider the degree of centralization required to achieve the business objectives, the number of parallel efforts or projects to consider, and the diversity and nature of the business process and functional requirements.

When defining the data management component of your implementation strategic plan, you need to understand the concepts of centralized and decentralized data management. Table 2 identifies the features, strengths, and limitations of centralized and decentralized data management strategies.

Table 2. Features, Strengths, and Limitations of Data Management

	Centralized Data Management	Decentralized Data Management
Features	■ All configuration development contained within a single repository and managed by a central development team ■ Separate views and responsibilities are used to selectively expose objects that are unique to specific audiences or areas of functionality ■ On run time, users have separate responsibilities to selectively expose objects that are unique to specific organizations ■ In multilingual environments, Siebel's locale and MLOV features are used to support localization	■ Independent regional repositories ■ Each repository supporting unique requirements and independent projects ■ Each environment responsible for designs and documentation which provide a basis for sharing objects

Table 2. Features, Strengths, and Limitations of Data Management

	Centralized Data Management	Decentralized Data Management
Strengths	■ Minimizes the costs and risks associated with maintaining consistency between shared objects—to configuring only one instance of an object at a time ■ Reduces the potential for miscommunication among overlapping project teams and unforeseen conflicts ■ Does not require one repository to be merged with another, and avoids merging and conflict resolution tasks required by the other strategies ■ Lessens the need to enforce strict naming conventions and configuration guidelines otherwise required to maintain separate versions of scripts, and so on	■ Decentralized distributed approach maximizes development concurrency and flexibility ■ Useful strategy for the implementation with huge diversity among business processes ■ Can be hosted in different system environments with different SLSA
Limitations	■ Can create bottlenecks and slow down the process as multiple individual developers need to access to the same objects ■ Presents challenges for staged releases. One set of changes to an object need to be tested and finalized at the same time a new set of changes to the same object needs to be initiated for a later release ■ Can be difficult to accommodate geographically or organizationally diverse configuration teams	■ Objects can be shared on a limited basis using Siebel Tools (Export and Import) ■ Objects are shared between a minimal number of repositories ■ A maximum of two or three repositories is recommended. It is very difficult to keep objects in sync ■ Limited or no need to share data directly between localized implementations

Map Your Business Processes

Mapping your business processes to your Siebel application requires that you drill down into your implementation strategic plan and carefully examine your current business processes. Remember to look at the general processes that all users of your application will do (such as submit time sheets), as well as examine those processes which are unique to certain user groups and channels.

Examine first the current state of your business processes. To effectively map your targeted processes to your Siebel application you want to analyze your current processes for improvement and to understand the pain points around these processes. Often times the process may be complicated; to help focus on those pain points, it is necessary to look at the business objectives and break down how the process supports the business objectives.

After you have documented your current state, map it to the Siebel application and identify gaps between your process and what can be achieved with the out-of-the-box Siebel application. To close the gaps and create your future state process, you'll need to modify the process, configure the application, or both. As you modify or configure, make sure that the changes you make are aligned with your business objectives.

For more information about business processes supported out-of-the-box by Siebel applications, see *Siebel Cross-Industry Business Process Guide*.

When mapping your business processes to the Siebel application, you should identify the tools and methodologies you are using to carry out each process. Are you implementing a new sales methodology as part of your Siebel solution? Identify where in your processes changes are needed so that you can make sure that all areas impacted by your Siebel implementation are addressed in your implementation strategic plan. Don't forget to consider training sessions that may be needed to educate users on new methodologies or tools that are being implemented.

Example

Figure 5 shows an example of a forecasting process currently being used in a pharmaceutical company. This current state process identifies 17 steps which are needed to develop a sales forecast. In examining the process, the company found that it took 7–14 days to complete a sales forecast, there were several non-integrated systems involved, there was no real-time information sharing, and manual selection and adjustments resulted in inefficiencies.
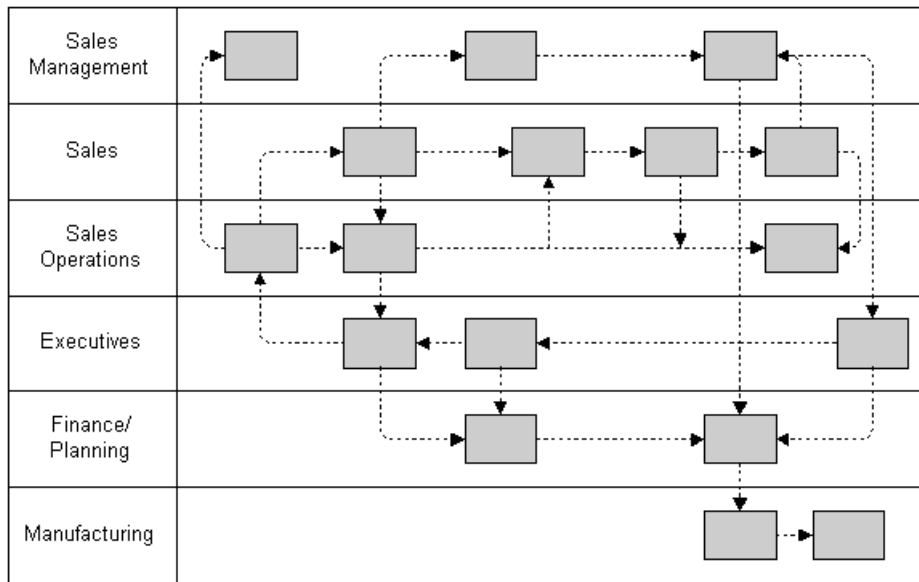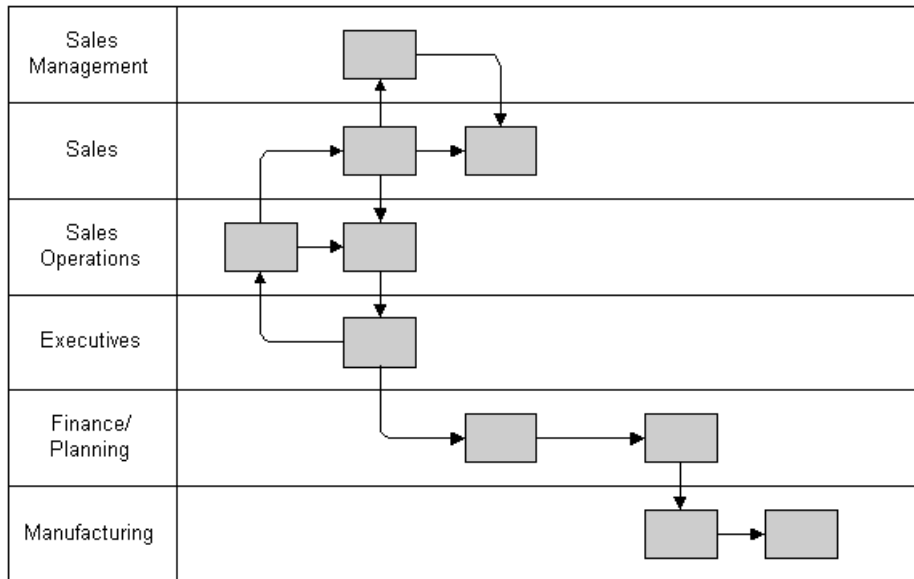

Figure 5. Current State of Sales Forecasting Process (Before Siebel Mapping)

After examining the current state, the company mapped their process to the future state (shown in Figure 6 on page 48); this was how the process would be carried out in their new Siebel application.

They developed their future state process by tying it to their business objectives of revenue growth, cost savings, and quality:

■ **Revenue Growth.** By increasing sales face time with customers (less time to forecast) and operatively addressing negative sales variance (sharing information real-time).

■ **Cost Savings.** By reducing sales administration time (less complicated, more efficient process) and minimizing inventory holding costs (more accurate forecast).

■ **Quality.** By improving employee satisfaction (more efficient system allowed the sales representatives to spend more time selling and helped them in their jobs).

Figure 6. Future State of Sales Forecasting Process (After Siebel Mapping)

Identify and Understand Your User Groups

When developing your implementation strategic plan, do not forget your user groups; you should consider them as internal customers of the Siebel application. You need to look closely at who will use your new system and how they will use it.

Each of your user groups has existing business processes to accomplish their jobs. You want to identify which processes are specific to each user group and examine how your Siebel application's functionality supports those processes. Look first at out-of-the-box functionality to see how it can support your processes.

Example

Table 3 is a list of user groups and sample processes for each group.

Table 3. Typical User Groups and Sample Processes

User Groups	Sample Processes
Service	■ Respond to call ■ Resolve call ■ Create service request ■ Escalate service request
Marketing	■ Create marketing plan and budget ■ Develop marketing program ■ Create segments ■ Develop offer ■ Launch and execute campaign ■ Capture campaign response

Table 3. Typical User Groups and Sample Processes

User Groups	Sample Processes
Sales	■ Create opportunity ■ Generate proposal ■ Generate quote ■ Create account ■ Create forecast
External Users	■ Search products ■ Request information ■ Send email ■ Purchase product

Incorporate Best Practices into the Plan

A best practice is a proven methodology for consistently and effectively achieving a business objective.

Make sure that you know what the best practices are for your implementation, and incorporate them into the implementation strategic plan. Best practices can be identified through using the resources available to you such as the *Siebel Bookshelf* and your project team members who have sound Siebel implementation experience.

Here are three important best practices that should be reflected in your plan:

■ **Use out-of-the-box functionality.** Best practices dictate that you use out-of-the-box Siebel functionality. When you evaluate your processes look first to out-of-the-box functionality. Using Siebel functionality reduces your customization of the Siebel application, which, in turn, lowers your configuration and upgrade costs. If your process is not supported by out-of-the-box functionality, ask yourself if you need to have it, and if you do, can it be evaluated for a future release.

■ **Use industry best-practice processes.** When you develop your implementation strategic plan to implement your Siebel application, look toward your industry's best practices and use them to accomplish your objectives. By applying your industry's best practices, you do not reinvent-the-wheel; you save time and money and reduce the risk to your Siebel implementation.

■ **Make sure to have some crowd-pleasing quick wins in each phase.** There are many processes that your Siebel application will touch, best practices recommend that you prioritize defined processes by the impact they have on your business as well as the ease of implementing the process. You should aim to implement some quick wins in each of your phases to gain user support and promote enthusiasm for the application.

Checklist

Before going on to the next phase, check that you have completed the following tasks:

❑ Communicate the overall Siebel strategy to your users to help your organization be customer-centric

❑ Understand the potential cultural barriers within your organization to implementing Siebel software, and have a plan to address them

❑ Identify a data management strategy

❑ Examine the current state of your business processes, and map your future state to your Siebel application

❑ Identify your industry's best practices, and plan to leverage them in your Siebel implementation

❑ Prioritize business processes by the impact they will have on your business and how easy they are to implement

Establish Program Management   4

This chapter discusses the importance of establishing program management. After you have aligned the organization and established a clear executive sponsor for the implementation, you must create the program management structure.

1	Establish Vision and Business Objectives	*Set up the rules, roles, and responsibilities that will keep you on track.*
2	Align the Organization	Best Practices for Program Management:
3	Develop the Implementation Strategic Plan	■ Establish a Steering Committee on page 57
4	Establish Program Management	■ Identify the Principles of Program Management on page 59
5	Develop a User-Adoption Strategy	■ Establish a Project Methodology on page 60
6	Phase the Implementation	■ Establish a Cross-Functional Project Team on page 63
7	Train Users	■ Establish a Risk Management Strategy on page 65
8	Measure Progress	Review the Checklist on page 68 before starting the next step.

What Is Program Management?

Program management is the establishment of the rules and people involved for your Siebel implementation. Establishing good program management establishes the rules of how you move your project forward, identifies who has the authority to make decisions, and provides accountability for your project. Program management also addresses the escalation procedures for each decision issue in your program.

Program Management ensures that quality assurances are in place through a quality management program. The program management structure that your implementation follows should contain checkpoints for quality assurances throughout the program.

Why Is Program Management Important?

Program management is key because it establishes the rules, roles, and responsibilities that help your implementation run on time and within budget.

Having the right people with the right authority and the right program management principles promotes trust in your Siebel implementation and keeps it on track.

Example

Figure 7 illustrates what the program management structure might look like for a large enterprise-wide implementation.
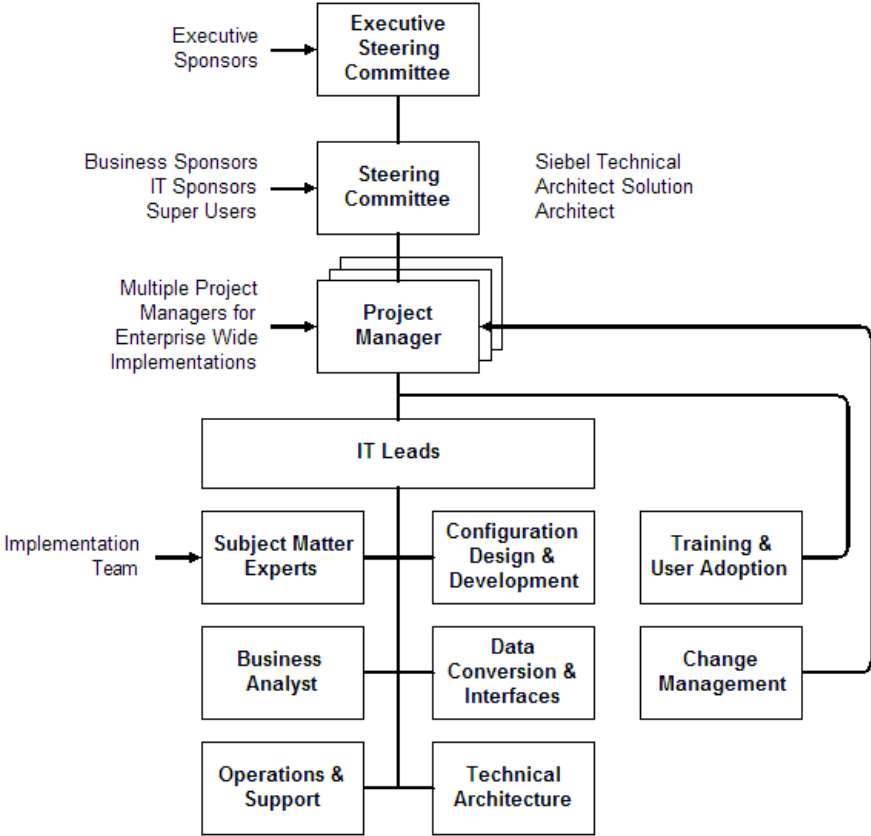
Figure 7. An Example Program Management Structure

Best Practices for Program Management

When establishing program management, consider the following best practices.

- Establish a steering committee

- Identify the principles of program management and the key decision makers

- Establish a project methodology

- Establish a cross-functional project team of certified members who have industry experience

- Establish a risk management strategy

Each best practice is described on the following pages.

Establish a Steering Committee

Your steering committee provides guidance and accountability throughout your Siebel implementation. It holds responsibility for the overall success of the implementation. The steering committee must understand the entire scope of the project as well as ensure commitment of internal project resources, accept project deliverables, and resolve escalated issues. The steering committee must have decision-making authority to resolve issues raised by the project.

Typically, the committee is composed of business and IT professionals from your organization. These individuals should be well-versed in your business objectives and the metrics for measuring those objectives. They should also have a fundamental understanding of the Siebel application and some knowledge of the Siebel development language (views, applets, and so on).

Your steering committee should maintain a regular meeting schedule so that members can review the day-today progress of the implementation and make sure that the objectives of the business are being met. The steering committee reviews issues and risks to the project on a regular basis and communicates project updates and important milestone dates to the organization.

For large, enterprise-wide implementations, an executive steering committee, in addition to the steering committee, needs to be established. The executive committee keeps track of the overall project and provides a point of escalation for important decisions. It is necessary that executives remain visible and supportive on the initiative, as well as apprised of its progress; in large implementations, the executive steering committee is an effective way to achieve this. It will help provide accountability for the executives, the steering committee, and the project team members.

Example

A large telecommunications company began a global implementation of their Siebel application by educating their steering committee. The VP of Sales was the executive sponsor of this CRM implementation. She started by conducting workshops for the disperse steering committee members based in different regions of the country. She explained the business vision and made sure that all members understood and bought into it. Next, the steering committee members attended a two-day training session where they learned the basics of the Siebel application and the language of the Siebel implementation.

The workshops assured the steering committee members of the executive sponsor's commitment to the Siebel implementation, and the training session provided them with the tools they needed to be an effective committee.

Identify the Principles of Program Management

Program management principles are the rules or laws on which your program will run. Establishing the principles of how you will govern your project is of fundamental importance. Many implementations get bogged down in the arguments over what gets implemented in what phase. Avoid this by establishing at the outset how decisions are made, who makes them, and who can make decisions when the normal process gets jammed.

Answer the following questions to help you identify the principles you'll want to use in your program management:

- Who are the key decision makers?

- What decisions they can make?

- To whom are the key decision makers accountable?

- What is the schedule of meetings?

- Who attends what meetings?

- What is the escalation path?

- Who has decision-making authority when the critical path is threatened?

- What is the time frame for resolving issues?

Make sure that your project team and steering committee are in agreement with the program management principles. In particular, people need to buy into the structure of authority if they are to adhere to it. Without a clear path of authority, you run the risk of poor decision making and of losing the vision of your Siebel implementation.
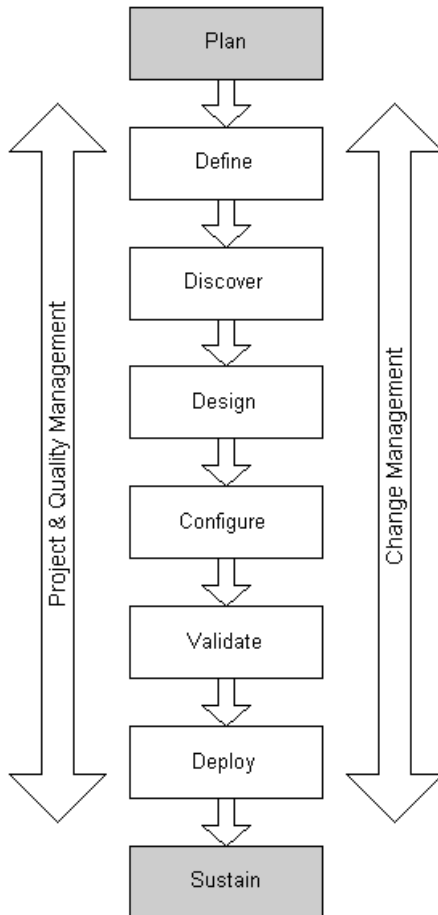
Establish a Project Methodology

Your project methodology should support your company's goals and objectives, as well as keep your project on time and budget. The project methodology should ensure each stage is defined, that the deliverables for each stage are defined, and that time frames are established for the stages. Your methodology should include who is responsible for which components of the plan and how the plan is to be implemented.

Figure 8 on page 62 outlines a project methodology called Siebel eRoadmap. Siebel eRoadmap breaks down into eight discrete stages with specific deliverables tied to each stage.

1 **Plan.** In the Plan stage, comprehensive strategies are developed that serve as the baseline for single or multiple implementation stages. Confirm that measurable business objectives are established, alignment of the organization has occurred, and a vision has been articulated.

2 **Define.** In the Define stage, project stakeholders are identified and the roles and responsibilities of the project managers (your own and Siebel managers) are communicated to all the stakeholders. Program management is established and the project methodology needed to manage the project is defined. Project-planning documents are created. The business objectives and the metrics that will be used to measure project success are validated.

3 **Discover**. In the Discover stage, functional and technical requirements of the business goals are documented and refined. Issues that may affect the design of the system are identified and documented. Requirement and gap analysis documents are typical deliverables of this stage.

4 **Design.** In the Design stage, the primary objective is to design a solution that best meets your identified business requirements. Using application screen flows and design layouts design prototypes of the proposed solution are developed and mapped to the requirements from the Discover stage. During this stage testing and training plans are develop.

5 **Configure.** In the Configure stage, your application is configured to meet your business requirements. Also, training materials are developed, testing executed, and preparation is made for the full deployment of the system through execution of change management plans and user-adoption strategy.

6 **Validate.** In the Validate stage, a full function test of the new system is completed. This stage has two parts. In the first part, a full function test of the application occurs with production data. In the second part, user acceptance test occurs.

7 **Deploy.** The first activity within the Deploy stage is execution of a production pilot. The purpose of the pilot is to test readiness for the full production deployment. The pilot is conducted in a subset of your business environment and provides all the system's features to users that subset. Feedback from the production pilot guides the second activity of the Deploy stage, which is the full deployment of the new system.

8 **Sustain.** In the Sustain stage, measuring results is the key element. Assessment of user adoption and customer satisfaction are also components of this stage. During this stage, you strive for continuous improvement by preparing to incorporate lessons learned in this phase into the Plan stage of the next phase of your implementation.

Figure 8. The Stages of Siebel eRoadmap

Best practice information about carrying out your project methodology appears in Chapter 6, "Phase the Implementation."

Establish a Cross-Functional Project Team

Create a cross-functional team that blends IT professionals, executives, and users to ensure a broad base of experience in technical, business, and Siebel-specific skills. Your project team will be completely focused on the project for the duration of your implementation.

Consider using project team members who have experience in the project methodology you have chosen. Whenever possible, use certified consultants; because of their thorough knowledge of the Siebel methodology and software, they are better able to map your business requirements to your application.

Use experts from your industry who understand your vision for your Siebel application. They should have experience in implementing Siebel applications and understand your specific industry needs.

Table 4 is a list of typical project team members and examples of their responsibilities on the team.

Table 4. Example Project Team Members and Their Responsibilities

Project Team Member Title	Responsibility
Project Manager	Creates and executes the project plan. Facilitates communication among team members. Monitors project scope. Tracks and resolves project issues. Manages the project personnel. Is responsible for status reporting. Serves as a representative of the project team to the executive steering or steering committee.
Business Analyst	Documents business objectives, business organization, communication channels, functional business requirements, and business processes. Maps business process to your Siebel application.
Application Architect	Proposes solutions that address the business and technical requirements of your business. Evaluates gaps between out-of-the-box Siebel functionality and your business requirements.
Technical Architect	Analyzes system integration requirements, data strategy, application integration strategy. Develops systems transitions strategies and the solutions for technical requirements such as SmartScripts and CTI.

Establish a Cross-Functional Project Team

Table 4. Example Project Team Members and Their Responsibilities

Project Team Member Title	Responsibility
Subject Matter Expert	Is versed in the operations of the business units impacted by the Siebel implementation. Provides information on current business processes and desired to be state. Validates customized training materials.
User	Provides input into system design. Validates system during user acceptance testing. Provides input to the development of training materials.

Establish a Risk Management Strategy

Risks are uncertainties, liabilities, and vulnerabilities that may cause a project to deviate from the defined plan. All information technology projects carry some element of risk, and not every risk in a project environment can be totally eliminated. Therefore, risk management procedures focus on the proactive elements of risk management by introducing early risk-identification mechanisms and risk impact analysis methods. The objectives of risk management are to minimize the impact of unplanned incidents on the project by:

- Identifying the nature, probability, and likely impact of potential risks before they occur

- Identifying and implementing preventive measures where possible

- Implementing contingency actions to deal with the risks when they occur

The risk management cycle is the reiterative process of identifying, analyzing, planning for, and monitoring risks and is an integral part of project management activities. Risk management activities require team effort and, as such, should be shared with and understood by the project team, supporting teams, customers, partners, suppliers, and management.

Establishing a risk management strategy early on helps you to mitigate risks to your project. A well-defined risk management strategy should focus on:

- **Risk Management Planning.** This is a one-time activity to prepare for the management of project risk. It is done at the start of the risk assessment activity in the risk management cycle.

- **Risk Identification.** This determines what risks might affect the project and its outcome. These risks need to be documented for subsequent analysis. Unlike risk management planning (which is generally performed once only), risk identification and subsequent risk management cycle activities are carried out throughout the project.

  Risks may (and should) be raised by any team member during the course of a project. However, these risks must be qualified as a risk and must not be confused with issues or action items. The team member should document the risk and present it to the project manager for review and inclusion into the next risk review.

■ **Risk Analysis.** During the risk analysis step, each identified risk is assigned a probability of occurrence and the consequences of risk impact are identified.

■ **Risk Response Planning.** This is conducted after risk analysis to determine how the project team is going to address each potential risk. Responses are developed and recorded for future action.

■ **Risk Monitoring.** This step is performed on a cyclical basis to determine whether there is any overall change in the risk picture; for example, Are risk events occurring? Have new risks been identified? This step usually leads the team back to risk assessment for both existing and new risks, and the cycle is repeated.

■ **Implementing Risk Response Plans.** If the risk occurs, the project manager authorizes the implementation of mitigation and contingency actions—this may involve seeking agreement from senior management to implement the agreed plans. However, the exact actions carried out will most likely vary from project to project and should be managed as documented in the risk management plan.

Figure 9 shows the risk management process.
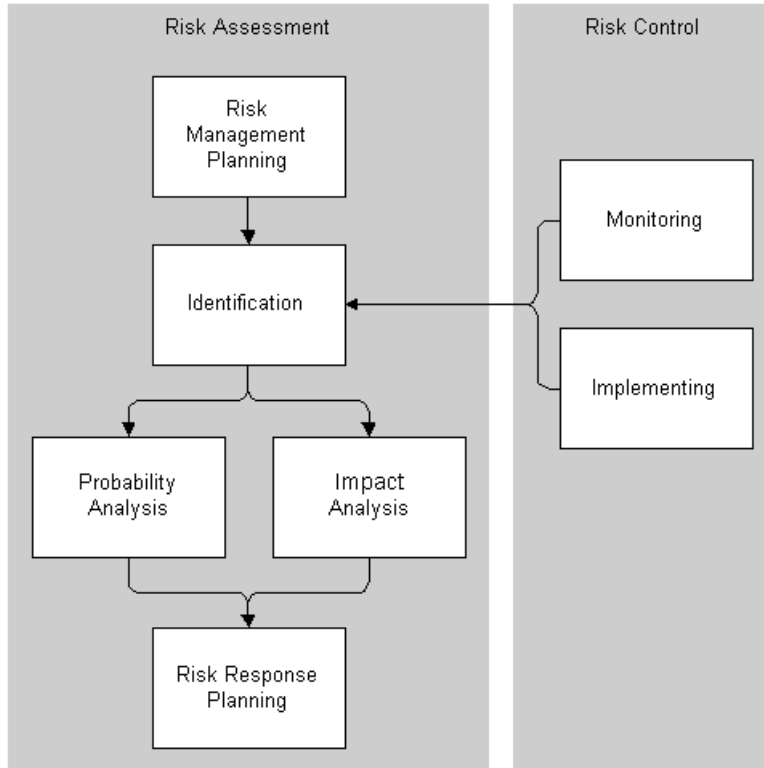
Figure 9. The Risk Management Process

Checklist

Before going on to the next stage, check that you have completed the following tasks:

❑ Establish your steering committee

❑ Establish principles of program management and communicate them throughout the project team

❑ Educate your steering committee and project team on the Siebel application and confirm that they understand your business objectives

❑ Identify the key decision makers

❑ Establish a risk management strategy

❑ Confirm that the key decision makers understand when and how decisions are made, who needs to be consulted, and how quickly decisions are needed

Develop a User-Adoption Strategy 5

This chapter discusses the importance of developing your user-adoption strategy. Organizations achieve the most benefit from implementing Siebel applications when they take a business-focused and user-focused approach to their implementation. A comprehensive user-adoption strategy helps to ensure that your users are able to use your Siebel application to achieve the desired business results.

1	Establish Vision and Business Objectives
2	Align the Organization
3	Develop the Implementation Strategic Plan
4	Establish Program Management
5	Develop a User-Adoption Strategy
6	Phase the Implementation
7	Train Users
8	Measure Progress

User adoption is key to a successful implementation. Plan carefully how you will introduce your users to the new application.

Best Practices for User Adoption:

- Identify and Communicate Performance Expectations on page 73
- Assess and Reward User Adoption on page 74
- Identify Support Structures and Develop Expert Users on page 76
- Plan for Training on page 77

Review the Checklist on page 78 before starting the next step.

What Is a User-Adoption Strategy?

User adoption is how well your users understand and embrace the business processes and the Siebel application. To achieve your business objectives, users must use the Siebel application in the way that it is intended.

A comprehensive user-adoption strategy focuses on the following five key elements:

■ Business alignment (See Chapter 2, "Align the Organization.")

■ Communication

■ Measurement

■ Training and support

■ Reinforcement

Some typical goals of a user adoption strategy are as follows:

■ Your users understand the reason for change and how it will impact them, their departments, their divisions, and the organization. Change management is an important component of your user adoption strategy and is discussed in greater detail in Chapter 2, "Align the Organization."

■ Your users understand what metrics will be monitored to ensure that change takes place according to the strategy.

■ The system and process are well aligned to ensure that users are competent and effective in doing their jobs in the new environment.

■ Your users provide input and test the processes and functionality that support their job responsibilities (Chapter 6, "Phase the Implementation").

■ Your users understand the training required to improve their skill sets, both behaviorally and technologically, to be successful and how the training will be delivered.

■ Your users feel supported after the implementation through coaching, help desk, and online help.

Why Is a User-Adoption Strategy Important?

User adoption is critical because you'll derive no benefit from implementing an application that never gets used.

A user-adoption strategy is important because it helps to identify barriers to user adoption and to identify the actions you'll take to minimize those barriers. A comprehensive user-adoption strategy allows you to allocate your (typically scarce) resources to activities such as training and support and to minimize user learning curves.

Best Practices for User Adoption

When developing a user-adoption strategy, consider the following best practices:

■ Identify and communicate performance expectations

■ Assess and reward user adoption

■ Identify support structures and develop expert users

■ Plan for training

Each best practice is described on the following pages.

Identify and Communicate Performance Expectations

An important component of the overall user-adoption strategy is the communication of change. Once alignment at the executive level has been achieved, a communication strategy for all users (including executives, managers, and IT professionals) should be designed and delivered, as discussed in Chapter 2, "Align the Organization."

Effective communication sets realistic expectations for users about the results anticipated through the new business strategy, how the new processes and tools support the strategy, and how each individual within the organization will be impacted and measured.

The implementation of a new system can be disquieting for users. To alleviate these concerns you need to identify how you expect your users to use your Siebel application to achieve your business objectives and to communicate this to your users. Tie your performance expectations to your measurable business goals and to your overall strategy, both of which have already been communicated to users. This way users understand the need for the change and know how they are to be measured on the use of the application.

When your users know clearly what is expected of them, they can use the system in a way that helps to achieve your business objectives. If performance expectations are clear and communicated consistently across your organization, you achieve higher rates of user adoption and get real buy-in to your system.

Assess and Reward User Adoption

Because user adoption is a critical element of success for your Siebel implementation, you will want to devote time and energy to assessing user adoption. You will also want to reward user adoption as this will help increase the rate of user adoption.

To assess user adoption you need to determine a measurement schedule and decide what you want to measure. For example, 180 days after the go-live date, you might choose to investigate the following:

■ If users are accessing the system

■ If users understand how to execute the processes to achieve results

You want to assess how your users are using the new system. There are a number of ways to make this assessment:

Metrics. Follow metrics such as the number of leads and activities being created.

Survey. Send out a survey to your users and ask the specific questions about their system use. You can formulate the survey so that the respondents can rank their responses on a scale of 1–5. Ask for response on specific statements, such as, "The new system helps me in doing my job." Ask enough questions to give you a good understanding of how your users are using the system and if they are happy with it.

Simulations. Use media-based simulations to reinforce training, but also to assess whether your users are using the system correctly by deploying knowledge checks with the simulations. You can capture the results of the knowledge checks to assess how well your users are using your system.

Throughout the entire process, it is important for managers and users to continually measure and manage performance to stay on track to achieve the business objectives. Best practice is to determine the rates of user adoption using several types of measurement.

Questions typically asked are:

■ Did the users learn the new behaviors and technological skills?

■ Can they apply these skills in a relevant business situation?

■ And, in doing so, are they achieving the desired results?

Rewarding user adoption is often not done due to budget constraints or the belief that it is unnecessary—after all, if usage is mandated, then people will use the system. However, rewards do not have to come with a big budget, and your users will respond more positively to rewards than to mandates. Think in terms of rewarding your users who adopt the system by recognizing their achievement in the company newsletter or by posting a flyer in the offices. Rewarding user adoption pays out in a higher user adoption rate for your Siebel application.

Example

A large pharmaceutical company rolled out Siebel ePharma to more than 6,000 users. They held an initial training event and provided the users with incentives to use the new system. Each sales representative was told that all new accounts were to be entered into the Siebel application, and that the number of new accounts entered would be measured at 30 days, 60 days, and 90 days. At the end of each period, the sales representative who entered the most accounts received a gift. At the end of 30 days, a monetary prize was given; at the end of 60 days a gift certificate was given; and at the end of 90 days, when the competition was most keen, the prize was a weekend getaway. Across the nation, new accounts were entered in a timely and accurate manner, and the number increased as the competition progressed.

Identify Support Structures and Develop Expert Users

Build a support structure that reinforces and supports all users through the transition to the new system, focusing on developing those behaviors and technological skills that are needed to achieve the desired business results.

Building a help desk that really helps your users is an important component of user adoption. Help desk staff should be trained in your Siebel application and be able to troubleshoot basic user problems. Moreover, it is important that your help desk staff understand how the application is both used and intended to be used by the various groups in your organization.

Don't ignore the informal support structures either. As users gain proficiency, they share knowledge with their peers. You want to ensure that the knowledge and practices that your expert users share are accurate reflections of your business objectives. Cultivate the expert users and reward them for their help.

Plan for Training

Once users at all levels understand the overall vision and how they fit into the big picture, best practice is to deploy education and training to build behavioral and technological competencies. This approach goes well beyond a user understanding what to do within the Siebel application; it includes preparing management to leverage the Siebel application when assessing and coaching frontline performance, as well as building the support structures needed for users.

When developing your implementation strategic plan, you should have identified your user groups. (See "Identify and Understand Your User Groups" on page 49.) In preparing your training strategy, you need to review this list of user groups. Then, outline customized training curricula for each group. Decide what type of training you are going to deploy and plan a schedule for it. Training is often left as a last detail in an implementation schedule, but has such importance for your user adoption that you should plan for it early in your implementation.

Communicate your training strategy to your users. If they are to attend training, let them know when, where, and for how long. You cannot expect people to be positive about a training event if they are asked to attend at short notice. Advanced planning and communication also keep your training costs down; changing training dates and locations increases costs, in addition to frustrating the attending users.

For information about best practices in training, see Chapter 7, "Train Users."

Example

A software company implemented Siebel Sales for their global sales force. To prepare the sales representatives for the training, the company sent out monthly animated announcements to inform the sales representatives about the training. Each announcement highlighted some of the benefits of the Siebel solution and informed the user group about training dates, times, and locations. Each sales representative received an email invitation to the training event that they were scheduled to attend.

Before they even stepped into the classroom, the sale representatives viewed the training as positive and helpful.

Checklist

Before going on to the next stage, check that you have completed the following tasks:

❑ Allocate resources to the communication, training, and support efforts

❑ Establish a plan for assessing user performance

❑ Identify and ready support structures for all levels of the organization

❑ Identify expert users

❑ Develop a training plan that addresses all levels of the organization, and identifies behavioral and technological competencies needed for each group to achieve results

Phase the Implementation 6

This chapter discusses the importance of using a phased approach when implementing your Siebel application. A phased approach to implementation allows you to target the business objectives for each phase and execute a strategy for quick wins. A phased approach encourages user adoption of new processes and minimizes risks to your organization.

1	Establish Vision and Business Objectives
2	Align the Organization
3	Develop the Implementation Strategic Plan
4	Establish Program Management
5	Develop a User-Adoption Strategy
6	Phase the Implementation
7	Train Users
8	Measure Progress

Use a phased approach where you design, configure, test, and roll out a limited product to a subset of users; then repeat, adding more functionality and enlarging the user base.

Best Practices for a Phased Implementation:

- Use Out-of-the-Box Functionality to Minimize Configuration on page 84
- Involve Users in the Implementation Design on page 86
- Develop a Test Strategy and Pilot on page 87
- Apply Lessons Learned From One Phase to the Next on page 89

Review the Checklist on page 90 before starting the next step.

What Is a Phased Implementation?

During a phased implementation, software functionality is deployed to targeted user groups over a prescribed period of time to obtain specific business results. Each phase should implement a discrete set of functionality that provides a distinct set of benefits for a specific user group. As the implementation progresses, each successive phase uses the cumulative output and the project team expertise from the previous phase to produce a positive effect on your business. Each phase follows your organization's implementation strategic plan and is mapped to your business objectives. Methods, initiatives, and achievements are communicated throughout your organization, and periodic evaluations ensure that your organization retains alignment. Figure 10 illustrates a phased implementation approach, where each phase leverages the work and experience of the previous phases so that each phase results in a significant business impact in a reasonably short time period.
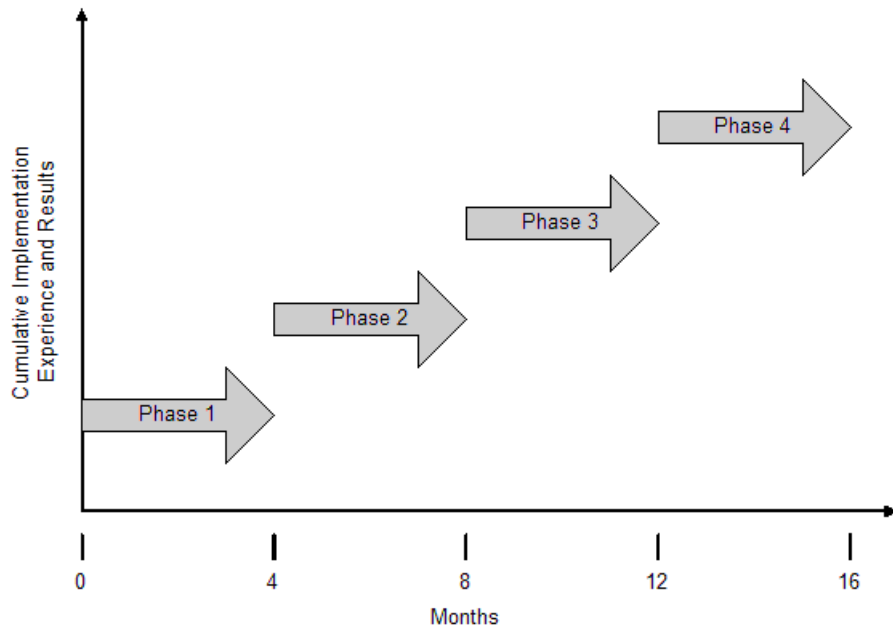
Figure 10. Example of Phased Implementation

Consider the following fundamental principles when planning a phased approach to your implementation:

■ Support each business objective with a business requirement

■ Focus on quick wins, rather than complex solutions

■ Examine existing Siebel functionality, and reuse when feasible

■ Align implementation goals to business objectives

■ Map business processes to out-of-the-box Siebel functionality

Why Is a Phased Implementation Important?

A phased approach to your Siebel implementation allows you to rapidly deploy a business solution that is tied to measurable business objectives, and obtain results that help to drive business development. Phasing your implementation helps you to identify and manage costs for your initial rollout as well as minimize expenses associated with testing, upgrades, and training.

Segmenting a project into manageable phases helps generate enthusiasm for the new system and builds momentum for subsequent phases of the implementation. As each phase is successfully deployed, project teams apply the knowledge gained to the next phase, providing an incremental track record of successes and improved processes for the organization.

Phased implementations also permit cost-by-phase and effort-by-phase estimates, which are helpful for budget management and adjustment.

Phasing your implementation allows you to gain quick wins at each stage. A quick win usually employs out-of-the-box functionality that provides an immediate solution to a business problem, and benefits a targeted set of users. A phased implementation maximizes the learning curve for new users by presenting new functionality in small bites, minimizing the perceived complexity of the new application.

Phased implementations allow your organization to learn and apply proven methods along the way. Each phase is evaluated, and feedback from users and customers may determine the adjustments that should be made to the next phase. New ideas can be tested in a low-risk environment, generating meaningful results for your organization. Involving users in the implementation design generates a sense of ownership and commitment to the success of the implementation.

Best Practices for a Phased Implementation

When planning a phased implementation, consider the following best practices:

■ Use out-of-the-box Siebel functionality, minimizing configuration

■ Involve users in the implementation design

■ Develop a test strategy and pilot

■ Apply lessons learned from each phase to the next phase

Each best practice is described on the following pages.

Use Out-of-the-Box Functionality to Minimize Configuration

Over-configuration is one of the biggest roadblocks to achieving success with an implementation. Your goal should be to achieve quick wins with out-of-the-box functionality.

Before configuring your application, make sure your project team members are familiar with the out-of-the-box Siebel functionality; this can be done through training courses, ensuring that you have Siebel experience on your team, and referring to the *Siebel Bookshelf*, in particular *Siebel Cross-Industry Business Process Guide*.

When considering a configuration, ask yourself, "Does this configuration initiative address my measurable business objectives?" If not, the configuration may be deferred for a later phase.

Two common pitfalls of over-configuring your Siebel application are:

■ Increasing budget overruns and missing important deadlines.

■ Increasing upgrade costs. For information about how configuration affects upgrades see *Planning a Siebel Upgrade*.

Another common pitfall related to configuration is trying to replicate your legacy system's functionality. Make sure that before customizing your Siebel application, you map the out-of-the box functionality to your business requirements as described in "Map Your Business Processes" on page 46. If the existing functionality supports the requirements, you can save costly and time-consuming customization.

Example

A large Fortune 500 company deployed its Siebel application to more than 100,000 users: sales people, call center representatives, marketing personnel and business partners. They minimized customization by presenting out-of-the-box business scenarios to their anticipated users to determine if the proposed solution enhanced business processes. The company identified the gaps where the solution was not helpful, and passed this information to the decision-making board, which determined if the application needed to be configured immediately, or if gaps could be resolved in a later release. The overall goal was to keep "customizations to an absolute minimum."

By keeping customization to a minimum, the company deployed a successful implementation while keeping to schedule and budget.

Involve Users in the Implementation Design

Involving your users in the implementation design is a critical best practice. Overlooking user involvement may result in poor user adoption and process design. The first step in involving your users in the implementation design is to show them out-of-the-box Siebel application and have them assess how standard Siebel functionality enables them to perform their job functions.

When designing your application's interface, you will want to make it user friendly and intuitive. Involving end users in the design helps you to develop an application interface that is immediately useful, promotes productivity, and significantly boosts a sense of ownership and enthusiasm for your Siebel application.

Users can provide expert advise on what is required to promote a smooth and productive workflow. By seeking out and acting on recommendations based on user experience, your implementation will garner a higher level of user acceptance and adoption.

Example

A large telecommunications company planned to roll out a Siebel application to more than 3,000 sales representatives and partners. The company organized demonstrations of the Siebel application, and actively sought users input on the application's out-of-the-box functionality. Users were given the opportunity to play in a virtual "sand box" and they were invited to send implementation suggestions to the project team leader. Each suggestion was reviewed, and selected solutions were communicated to the users.

At "Go-Live," the users were already familiar with the system or had heard details from other coworkers. The involvement of end users, from the evaluation stage through the application rollout, promoted corporate communications, product enthusiasm, and sense of pride in the success of the implementation.

Develop a Test Strategy and Pilot

Testing is an often-overlooked component of an implementation, but it is critical to success. One of the key components in achieving success with your testing strategy is to formulate the strategy early in the implementation. Implementing a comprehensive testing strategy saves time and money.

Developing a comprehensive test strategy and devoting resources to testing the application in the development environment before migrating the application to the production pilot, helps to mitigate risks such as production down time, performance issues, and functionality that does not meet the needs of your business.

Testing verifies that the system meets the system specifications and requirements for its intended use and performance. During testing, the software application is exercised, and testers attempt to identify procedures and actions that may cause the application to fail.

When developing your test plan, consider the following best practices:

■ **Define your testing strategy and develop a detailed test plan.** At the beginning of your implementation, define expectations, testing time frames and the expected business value of your test program. Build a detailed test plan from the cumulative requirements, and the process flows, to ensure that the test cases you use meet your business requirements.

■ **Test the system using representative data and scenarios.** When performing system testing, examine all links and data flows between your Siebel application and other systems and applications and test business transactions. Testing functionality occurs in parallel with the configuration effort so that problems can be identified as early as possible. Load and stress test your application using a range of different activities to determine what conditions affect response times or interrupt system transactions. Test your system with a full volume load of sample data that is representative of your company's production data.

■ **Perform adequate load and performance testing.** Load and performance testing allows you to address critical concerns of performance and scalability. Specifically, test and analyze the impact of varied numbers of end users, volume of system transaction activity, network and hardware capacity, and configuration of Siebel applications.

- **Perform user acceptance testing.** User acceptance testing should focus on the functionality and usability of the application and system, and verify that all business requirements are met. Recruit users from your customer community as well as business representatives to participate in acceptance testing. The data used for testing should be similar to the data that the users will encounter in the production environment.

- **Develop a pilot rollout for final verification.** Implementation verification using a pilot rollout is a step that is often omitted because of schedules and budget issues. During the pilot rollout, users provide the final validation of your Siebel implementation, testing the application and system in a highly structured production environment, over a period of time. The pilot rollout allows you to make final adjustments prior to your global deployment. Omitting a pilot, or poor participation in a pilot, may jeopardize the success of your implementation.

Apply Lessons Learned From One Phase to the Next

A phased implementation allows you to apply the lessons learned from a previous phase to the next phase of your implementation, avoiding earlier errors and streamlining the process.

To benefit from this best practice, you must establish and maintain robust, consistent communication with your users, project team, and executives. Users must feel that their feedback is integral to the implementation process, and suggestions are taken seriously. You must support the project team efforts to incorporate feedback so that it results in appropriate adjustments for subsequent phases. Build feedback loops into your project plan.

Example

A large manufacturing company rolled out their Siebel application to more than 2,000 users. The company's game plan for implementing the Siebel application was to "Think big, start small, scale fast." This philosophy allowed the company to identify quick wins in each phase that generated user enthusiasm for the Siebel application. The company solicited customer and user feedback, and then tested new ideas in a low-risk environment.

Checklist

Before going on to the next stage, check that you have completed the following tasks:

❑ Establish a phased implementation plan that ensures quick wins in each phase

❑ Identify and communicate the forum for gathering feedback

❑ Identify the target audience for your phased implementation

❑ Develop a plan to market the wins of your phases to the user community

❑ Develop a test strategy and plan

Train Users 7

This chapter discusses the importance of training your users and of reinforcing that training. User adoption is critical to the success of your Siebel implementation. Chapter 5 discussed the importance of developing a training plan for your implementation; this chapter discusses best practices for training your users.

1 Establish Vision and Business Objectives	*Training is a process, not a single event. Training can range from initial instructor-led sessions to Web-based training on advanced topics.*
2 Align the Organization	Best Practices for Training Users:
3 Develop the Implementation Strategic Plan	■ Develop Day-in-the-Life Training on page 95
4 Establish Program Management	■ Deploy Training Using a Mix of Training Methods on page 97
5 Develop a User-Adoption Strategy	■ Prepare Your Managers on page 98
6 Phase the Implementation	■ Address Need for Ongoing and Advanced-Topic Training on page 100
7 Train Users	■ Plan Training for System Upgrades and New Hires on page 101
8 Measure Progress	Review the Checklist on page 102 before starting the next step.

What Is Training?

Training is a process, not just one event. Training helps your users gain proficiency with the new application, use the application the way that your business intends for it to be used, and understand how it supports their tasks. In the training process you move your users along the proficiency curve from beginner towards the ultimate goal of expert user.

Training should focus on the processes and functionality of the new system. It should be role-based using a day-in-the life format so that each type of user in your organization learns how they are expected to use the system to perform their particular job.

Because you don't implement all desired functionality in one phase (see Chapter 6, "Phase the Implementation"), you cannot train users on the whole application in one training phase. Depending on the types of changes, your users, and the number of changes you implement in each phase, train your users in multiple sessions over the phased release cycle. After initial classroom training, consider methods such as Distance Learning and quick reference cards to reinforce training and to teach functionality added in later phases.

Why Is Training (and Reinforcing Training) Important?

Training is an important element of any implementation and should be considered as part of the overall implementation plan. Typically, from one training event an average user retains only 30–50% of the taught material, which is insufficient for good adoption rates. You need to develop training that reinforces behaviors and technical skills after the initial training event to move your users along the proficiency curve.

Figure 11 illustrates the importance of users gaining proficiency. This particular data was taken from a telecommunications company where users were measured in their proficiency levels with the Siebel Call Center application. The users who were more proficient with the system were significantly more effective and saved hours each week over those who didn't use the system. The highly proficient users were most satisfied with the system.
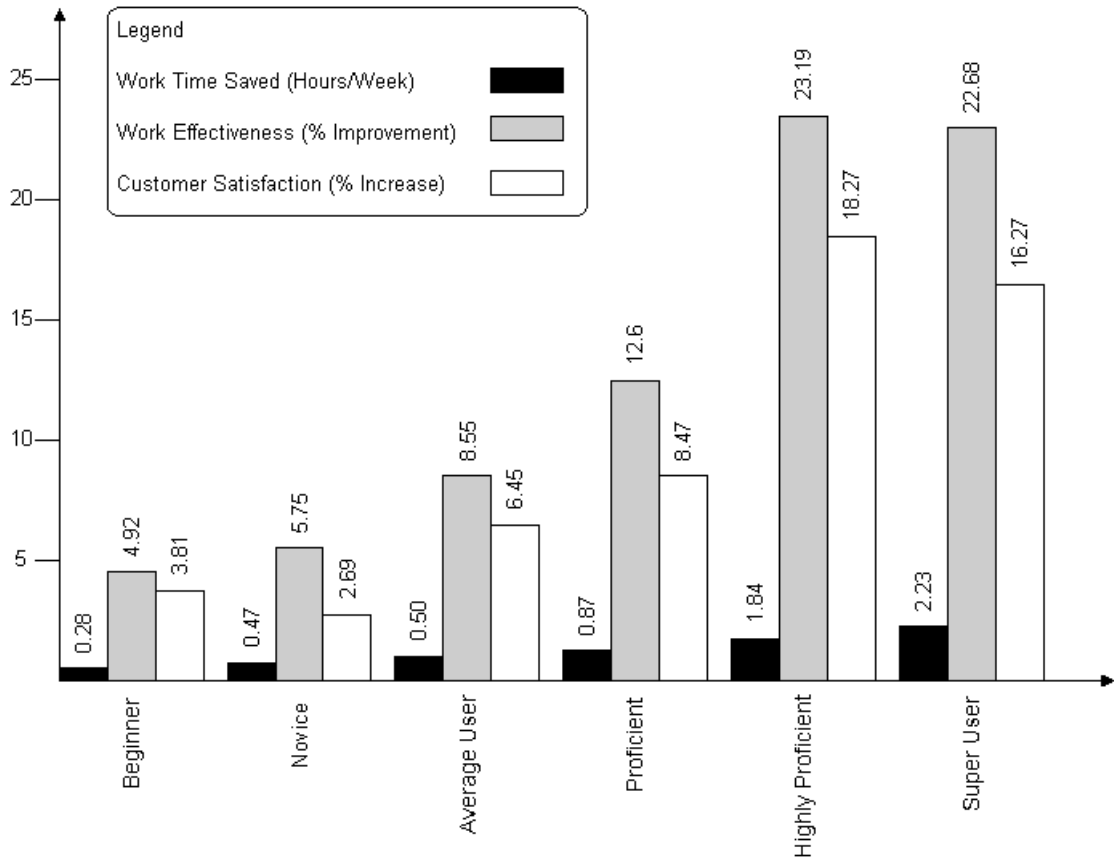
Figure 11. Post Rollout Measurement Data: Sample User Output

Best Practices for Training Users

When you develop and execute your training plan, consider the following best practices:

- For the initial release of your application, develop a role-based, day-in-the-life training program

- Deploy training through both instructor-led and media-based technologies

- Prepare managers to use the system and to manage and support their employees who use the system.

- Address the need for ongoing training and advanced-topic training

- Plan training for system upgrades and enhancements and training to support new hires

Each best practice is described on the following pages.

Develop Day-in-the-Life Training

Because your users will not all use your Siebel application in the same way, your training should reflect different approaches to learning and the different ways users will use the application. People need to learn how to use the Siebel software in the context of how they will use it every day. They should be taught what benefits they can expect from using the new system. A recommended approach is to train each of your user groups as if they were starting their work day with their new application. Your training approach should walk them through a scenario of typical tasks and show how the Siebel application is used in each instance. For example, if your sales representatives need to see new leads, they will log into the application first thing in the morning and view a list of new leads. Then, they might check their calendar to see what appointments they have that day, and so on. Each task that is associated with the Siebel application should be taught in a Tell, Show, Do manner. Tell the user what they need to do, show or demonstrate the function in the application, and let the users practice the task in the classroom.

Don't forget to consider training other areas, in addition to training on the application. For example, are you introducing a new methodology or other tools as part of the total Siebel solution? If so, users need training on these. When you are teaching users a new methodology, consider training for this separately from the application and process training. In this way, the new methodology is understood apart from the application and is accepted for its own merits by the intended users.

Example

A large technology company planned a Siebel implementation for more than 15,000 users, globally. The company identified their user groups by department, and then by how each would use the Siebel application. The groups they identified were sales, marketing, call center, sales support, sales managers, and cross-functional (a group made up of accounting, fulfillment, and distribution). Each group had a customized training curriculum that addressed the daily, weekly, and monthly tasks they needed to complete in the Siebel application.

Special attention was given to integrating the new sales methodology with the use of the application. The sales organization was implementing the Target Account Selling (TAS) methodology to manage their sales opportunities. Users in sales were first trained in the basics of the Siebel application (applets, navigating screens, personalization, and so on). Shortly afterwards they received specific training in the TAS methodology, where they created sales plans on their live sales opportunities, using the TAS module in the software to create, store, and share plans.

Each group felt the training was successful. They believed that their professional needs were addressed, and they learned what was expected of them when using the new application.

Deploy Training Using a Mix of Training Methods

People learn in different ways and at different speeds so an effective training solution needs to address this. Combine instructor-led and media-based solutions to reach diverse user groups.

For your initial release, consider a blended delivery solution of media-based and instructor-led training. Instructor-led training is recommended because it provides individualized attention and is best for new business processes training. Instructor-led training is a good way to educate your users on how the system enables them to better perform their job functions. Most people respond well to instructor-led training because they can ask questions easily and get immediate support from the instructor and their peers. Media-based training can be used to reinforce the technological behaviors you wish your users to practise. Media-based training can be deployed before or after an instructor-led training event: pre-training to introduce new concepts and the tool, and post-training to reinforce training.

Consider various learning technologies to support your training: Examine the benefits of Web-based training, simulated training, and Distance Learning to supplement initial training. For example, Web-based training can be used to good effect before the initial instructor-led session to introduce fundamental skills and concepts and to ensure that all participants start at the same level.

Example

A midsize telecommunications company rolled out Siebel Sales to 1,250 users using instructor-led and media training to great success. The initial training occurred in the classroom where the most significant changes to business processes were taught, discussed, and practiced. Follow-up training was done using self-paced media training where users were able to access the specific modules they needed for their job roles. At the end of each media training, users completed a self-knowledge check which identified their strengths and weaknesses.

This training was very well received by the user community. They felt "that the training addressed their individual needs so that they could use Siebel effectively."

Prepare Your Managers

Your managers are a very important group in achieving success with your Siebel implementation. Manager adoption rate directly influences user adoption rates. Users notice whether managers are using the new application and follow the example set for them. If your managers are not taught how to use your Siebel application to gather information and support users, you will have a lower rate of user adoption. Special attention needs to be given to this group of users.

Managers need to buy into the benefits of the Siebel application early and be able to communicate those benefits to their user communities.

A key to user adoption is to have managers who actively use the Siebel application and the processes that support it. Managers should be able to use the system to:

■ Assess individual and team performance

■ Adjust tactical priorities in real-time

■ Provide targeted coaching and reinforcement

A good plan is to have the managers in some of the same training classes as their employees. This shows support for the employees and the new system. Provide additional training classes for managers where they can learn how to use the system to mentor and coach their employees and to gather the data they need to do their jobs. For example, managers may need to learn how to gather forecasting data so that they can examine who closes what deals and how often. This information can be used to coach and mentor their employees.

Example

A large software company implemented Siebel Sales to 6,000 users globally. In Phase I of the implementation, the training was held throughout the regions and managers attended with their employees. The managers had a one hour add-on session at the end of the training to instruct them on the basics of Siebel reporting functionality. As the company readied for Phase II of their global rollout, they assessed the usage of the Siebel application in the first group.

The company found that when managers did not use the application, their employees did not use the application either. The company informally polled the managers to identify the reasons for resistance and learned that the managers did not feel able to use the application to the extent that they needed to.

The company then planned a full day of training for all managers using Siebel and instructed them on how to use the application, and also on why they needed to use the application. The managers were given tips on coaching and mentoring of their employees as well.

Following this training the managers felt "better equipped" to use Siebel Sales and the user adoption rate rose within the Phase I Group. The Phase II Group benefited from the same training efforts and saw a quicker user adoption rate than the Phase I Group.

Preparing your managers to use your Siebel application will help you achieve higher user adoption rates.

Address Need for Ongoing and Advanced-Topic Training

Training is a process that needs to be ongoing and supportive of your users' needs. You want to move your users along the proficiency curve to get the most benefit from the Siebel application. Plan for on-going training and advanced topic training to assist your users in gaining proficiency.

As your users learn the basics of the Siebel application, they will want to learn more and increase their use of the application, and you will want to encourage them in this. Consider developing a library of Web-based training topics to provide your users with additional training on advanced topics. For example, you may have taught querying in your initial training event, but your users have grasped the basic operators and are ready to learn more about querying. A Web-based training course on compound queries provides them with the training they need and they will be able to access it when they are ready to learn it.

Another forum for training can be your staff meetings or company meetings. Provide updates to the system with short informative training sessions. You may consider publishing tips and tricks on using the Siebel application in a company newsletter or posting training tips on the company intranet.

Ongoing training should be included in your change management plan and user-adoption strategy.

Example

A large insurance company implemented Siebel software to 7,000 sales representatives. The company developed a comprehensive training plan to ensure that the sales representatives would have just-in-time training. The plan included:

■ Instructor-led training for the initial release

■ Telephone support for the first few days of go-live

■ Weekly tips-and-tricks messages sent out via email

■ Web-based training for refresher training of the initial training

■ Web-based training for advanced topics

All of these elements gave the sales representatives support in learning the initial application and also provided them additional, on-going training when they were ready.

Plan Training for System Upgrades and New Hires

After the initial training for the new Siebel application, many companies forget to plan for upgrades and new hires. Remember, training is a process, not an event. As you progress in your phased implementation, you will be putting in place new processes and new functionality for which users require training. Providing ongoing training will help increase your users' proficiency with your new system and help drive business results.

You should consider various training options according to the number of new functionalities and processes in each release. If there are a lot of changes, you may consider an instructor-led, or Distance Learning training. Quick reference cards or job aids may be sufficient for minor releases. Self-paced Web-based training can provide training for the releases with a medium-level of new functionality.

Example

A technology company with more than 7,000 employees developed a Web-based curriculum of 20 introductory courses designed for new hires. New hires took these courses to become familiar with the company's core applications.

Each self-paced class provided recorded demonstrations of basic application functionality, plus additional aids to enhance the employee's understanding of the functionality. Employees who wanted to take advantage of the company's career track option completed the knowledge check and, if they passed, received credit for the class.

Checklist

Before going on to the next stage, check that you have completed the following tasks:

❏ Develop role-based training for all levels of users, executives, and managers

❏ Identify the best method of training delivery for each user group based on learning objectives and corporate culture

❏ Develop training materials with input from users

❏ Provide specific training to management on how to use the new system to drive results and manage performance

❏ Create a support structure for the training and education of the users

❏ Establish a plan to reinforce and build proficiency with the new behaviors and tools

❏ Put in place ongoing training and new hire training

Measure Progress   8

This chapter discusses the importance of measuring your progress towards achieving your business objectives.

Once you have implemented your Siebel application, you must monitor, measure, and track your system's effectiveness.

1	Establish Vision and Business Objectives
2	Align the Organization
3	Develop the Implementation Strategic Plan
4	Establish Program Management
5	Develop a User-Adoption Strategy
6	Phase the Implementation
7	Train Users
8	Measure Progress

After rollout, measure progress towards your established business objectives.

Best Practices for Measuring Progress:

- Define Metrics for Measuring Performance on page 107
- Monitor Progress Against Your Business Objectives on page 108
- Build an Action Plan to Address Gaps on page 109

Review the Checklist on page 112 before starting the next step.

What Is Measuring Progress?

The measurement process is the method you use to see how well your implementation is supporting your business objectives. Measuring begins with looking at the established business objectives and the metrics to evaluate the achievement of these business objectives. Measurements are derived from the achievement of your metrics.

Monitoring progress includes monitoring users with the new system. This provides you with insight into how your users are using the system and achieving results through system use. For more information, see Chapter 5, "Develop a User-Adoption Strategy."

Reporting is an important part of measuring results. Key findings and results should be reported to all levels of the organization to help them identify new initiatives for improvement. Equally important is to celebrate successes. By measuring the progress, you know if you have attained your goals; when this occurs, communicate and share that success with your community. Involvement of your key players in ongoing system analysis maintains enthusiasm and encourages users to gain proficiency.

Your reporting system should be automated, integrated, offer predefined and flexible query functionality, and deliver drill-in and drill-through capabilities to analyze underlying causes of the results.

Why Is Measuring Progress Important?

Through measuring results you can identify:

- When you have successfully met your business objectives

- What changes still need to be made

- How to make the right decisions for moving forward

- Assess user adoption (Chapter 5, "Develop a User-Adoption Strategy")

The measurement process begins early in your implementation plan when you are setting the business objectives for your implementation (Chapter 1, "Establish Vision and Business Objectives"). As part of your implementation plan, you should have identified specific, measurable, and achievable objectives and support these by agreeing on metrics that give you the needed information to assess progress and to take corrective action in real-time ("Define Metrics for Measuring Performance" on page 107).

Knowing the past and focusing on the future provides needed insight to make staffing, resource, and investment decisions as these relate to training, process re-engineering, legacy application integration, and so on. The measurement of progress is not an isolated activity that only focuses on technology; instead, it also heavily relies on strategy, people, process, and all components of change management.

Best Practices for Measuring Progress

When implementing processes to monitor and measure the results of your implementation, consider the following best practices:

■ Define metrics for measuring performance

■ Monitor progress against the business objectives

■ Build an action plan to address gaps

Each best practice is described on the following pages.

Define Metrics for Measuring Performance

You should define metrics that track back to your measurable business objectives. Consider using existing metrics because you have already established that these are important and they are already owned by individuals and departments.

Objectives generally relate to revenue enhancement, cost reduction, and quality improvement. The metrics that best capture improvement against these goals should be agreed-upon and communicated to all stakeholders. Many companies select only outcome or lagging metrics. However, it is critically important to track leading metrics as well.

Lagging metrics. These metrics track outcomes, usually after-the-fact results, for example, revenue per representative, cost per representative, close rate, customer satisfaction, and so on. Measuring progress in this fashion is like driving your car by looking in the rear-view mirror—it is too late by the time you see the results.

Leading metrics. These metrics monitor the effort, inputs, factors, and activities that drive the ultimate outcomes. For example, data quality (in the customer data base), product defects in terms of error rate, and percentage of call-center agents adept at using the new system are leading indicators for a company looking to reduce its first-call resolution rate, a lagging indicator.

Metrics should also be specific because this makes it easier to assign ownership to individuals who already have functional reporting relationships and understand the processes/activities relevant for their functions. For example, customer satisfaction, albeit lagging, is a worthy metric and should be measured at the business-unit level. However, leading metrics related to marketing, sales, and service, such as the number of leads, the size and quality of pipeline, and the number of warranty purchases, respectively, should be assigned to functional owners. While the actual number of metrics a company decides to track differs by industry, competition, and current level of automation, it is recommended that three to five metrics per functional area be tracked.

A key step in defining and assigning metrics is showing the owners exactly how the metric is calculated and clearly distinguishing acceptable and unacceptable performance ranges. The metrics, and their supporting calculations, should be based on what needs to be measured, rather than what fits the current measurement system.

Monitor Progress Against Your Business Objectives

It is important to monitor your progress against the business objectives that you established. For example, you may have established increase first-call resolution as a business objective. You want to monitor your progress toward this objective over a period of time. It is not practical to think that you can achieve your objective in the initial months after rollout, so you need to monitor the progress toward that objective. You may take the first measurement at three months, then again at six months, and again at nine months. You may measure this by surveying your customers and evaluating the data in your Siebel application to determine the increase in first-call resolution over the nine-month period.

If you don't get expected results, make sure your users are actually using the system. You can learn this through your user-adoption strategy.

Measuring progress and striving to improve results is a continuous process. Best practices recommend that ongoing measurement should occur at three-month intervals during the first 18 months and thereafter on a timeline that is appropriate.

Example

A telecommunications company established as a business objective reacquiring 35% of the customers that left their services for another company. The company set up a measurement schedule at three months, six months, and nine months to evaluate how many customers were re-acquired during each period. At the three-month period, the company evaluated the data in their Siebel application to learn that 5% of the customers were re-acquired and then measured again at six months to learn that 15% of their customers had returned. At this point the company felt that the target of 35% was not achievable and surveyed the users to learn if the system usage was a problem. The company learned that calls were not being made to the required number of customers because the users were not checking the new system for the identification of these customers.

The company revised the communication plan to the users, instituted follow-up training, and trained managers on supporting the targeted goal. While the company did not achieve the targeted goal of 35%, they were close at 27% and well on their way to achieving the stated business objective.

By monitoring the progress against their objective, the company was able to achieve its goal through the revision of training, support, and communication.

Build an Action Plan to Address Gaps

Once you have determined how your Siebel system is impacting your business, you need to identify the gaps between reality and your desired business state. If your business objective was to "Decrease call waiting times by 20% over a three-month period" and this has not occurred, you need to examine why. Ask questions to determine if the system is being used as intended, such as:

- Are your users not happy with the system?

- Have they told you that the interface is cumbersome?

- Is your system performing well?

- Does it move fast enough for your users?

- Do your users understand how they are to use the system?

Knowing the problem is the first step, but you need to build a plan to address the gaps in your objective achievement. As results start to come in, your metric owners should be able to explain not just what happened but also be able to answer why it happened, only then can action plans with appropriate timelines be developed to address performance gaps.

Are your users unhappy with the system? You may want to establish a user forum to gather information from the user community. The benefits of such a forum are both getting the information you need and also demonstrating to the user community that you have heard them and want their input. The establishment of the user forum alone may make your users happier about the new system.

Is the interface cumbersome? You should seek input from your users and communicate that to the design team. Assess the input and determine if there are changes that you can make to the interface to help address your users's concern.

Is your system performing well? Is it fast enough? You need to revisit the technical requirements for your application and determine if this is the case. Or maybe your users are not using the system well. Do they know how to use it? You may need to provide additional training materials or sessions, improved help desk support, or engage your expert users for support.

Successful companies have steering committees and review boards that are responsible for diligently examining ongoing progress. Members of these groups use executive involvement, reward and compensation systems, process changes, skills development and training, and culture in determining the remedial steps necessary to address performance issues. The leadership team should realize that even when there is genuine interest and commitment to achieve results, implementations may fail if these other components of change are not considered when creating action plans to fix gaps.

It is important to assess the influence of obstacles inhibiting success. Lack of resources, organizational misalignment, inadequate documentation of policies or processes, and insufficient training are some examples of obstacles that need to be continuously tackled and removed.

Whatever you assess as the problem, carefully consider technical and human factors in building your plan to increase the impact of your Siebel implementation on your business and improve user adoption.

Example

Table 5 shows an example of an actual action plan taken from an electronics firm.

Table 5. Example of an Action Plan to Address Gaps

Component of Plan	Description
Identified Gaps	1 Lack of communication to the sales department about parts, components, and systems that are in immediate supply for build and shipment to customers
	2 Lack of communication to the field department about optimal configurations that deliver higher margin by product class
Objectives	1 To increase communication about parts, components, and systems that are in immediate supply for build and shipment
	2 To increase communication about optimal configurations that deliver higher margins
Frequency of updates	Weekly

Table 5. Example of an Action Plan to Address Gaps

Component of Plan	Description
Medium	**1** Weekly alerts to sales department (sent from within the Siebel application) which point to profitable options
	2 Suggestions for bundling and cross-selling during proposal development automatically generated within the Siebel application
Concerns	**1** Priority of this initiative relative to other initiatives in the business unit
	2 Resource constraints (people and infrastructure related)
	3 Information availability and access to gross margin by product and part is currently only available for three of the top-10 selling product classes
Owner	VP of Sales for the hardware product line

Checklist

To continue along the path to success, check that you have done the following:

❑　Identify three to five metrics per functional area

❑　Determine how you will measure against your baseline

❑　Develop a plan to address gaps in performance and business results

❑　Develop a plan for ongoing and continuous measurement of the use of your Siebel application

Next Steps 9

This guide has provided you with an overview of best practices to help you achieve success with your Siebel implementation.

You have established measurable business objectives, aligned your organization, established performance metrics, developed an implementation strategic plan and a user-adoption strategy, developed a role-based training, and put in place a good program management structure. All of these things have given you a good start to a successful implementation and to receiving your return on investment. Now, what are the next steps?

A successful implementation creates a feedback loop. You must measure, monitor, and track the performance of your system to continuously improve and refine its performance and your users' adoption of it. Figure 12 illustrates this continuous process of planning, implementing (designing and building), and sustaining (running the application), followed by the next round of planning, implementing and sustaining.
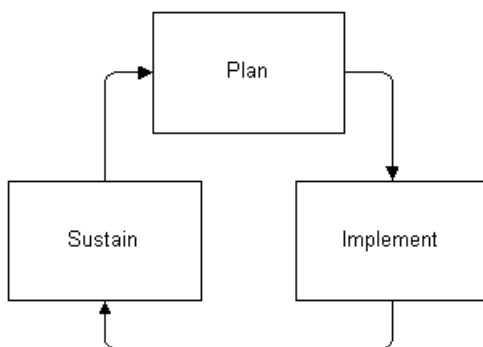
Figure 12. The Implementation Feedback Loop

Your investment in your Siebel application needs to continue: keep your communications bidirectional, keep your sponsorship visible, keep your users involved, adhere to your implementation strategic plan, and your success will be ongoing.

A successful Siebel implementation requires a lot of effort from many levels of your organization, from the executive to management to frontline staff. Siebel Systems wants to help you achieve success and offers a variety of services to that end. For further information email Siebel Professional Services at SiebelGlobalServices@siebel.com.

Checklists A

This appendix contains a consolidated list of the checklists that appear at the end of each chapter. You can use these tables as a worksheet to chart the progress of your Siebel implementation.

Table 6. Establish Vision and Business Objectives

Date Completed	Task	Task Owner
	Identify at least four measurable business objectives	
	Rank the business objectives in order of importance to your business	
	Make sure that objectives are time-bound	
	Develop metrics for measuring achievement of objectives	

Table 7. Align the Organization

Date Completed	Task	Task Owner
	Identify your executive sponsors and confirm that these sponsors can succinctly articulate the Siebel implementation vision	
	Identify business stakeholders and confirm that they can articulate the key benefits of the Siebel implementation to the user community and will become advocates for the Siebel application	
	Create a balanced change management plan that includes a two-way communication	
	Educate your frontline managers about the vision, objectives, and tools for success in managing users	

Table 8. Develop the Implementation Strategic Plan

Date Completed	Task	Task Owner
	Communicate the overall Siebel strategy to your users to help your organization be customer-centric	
	Understand the potential cultural barriers within your organization to implementing Siebel software, and have a plan to address them	
	Identify a data management strategy	
	Examine the current state of your business processes, and map your future state to your Siebel application	
	Identify your industry's best practices, and plan to leverage them in your Siebel implementation	
	Prioritize business processes by the impact they will have on your business and how easy they are to implement	

Table 9. Establish Program Management

Date Completed	Task	Task Owner
	Establish your steering committee	
	Establish principles of program management and communicate them throughout the project team	
	Educate your steering committee and project team on the Siebel application and confirm that they understand your business objectives	
	Identify the key decision makers	
	Establish a risk management strategy	
	Confirm that the key decision makers understand when and how decisions are made, who needs to be consulted, and how quickly decisions are needed	

Table 10. Develop a User-Adoption Strategy

Date Completed	Task	Task Owner
	Allocate resources to the communication, training, and support efforts	
	Establish a plan for assessing user performance	
	Identify and ready support structures for all levels of the organization	
	Identify expert users	
	Develop a training plan that addresses all levels of the organization, and identifies behavioral and technological competencies needed for each group to achieve results	

Table 11. Phase the Implementation

Date Completed	Task	Task Owner
	Establish a phased implementation plan that ensures quick wins in each phase	
	Identify and communicate the forum for gathering feedback	
	Identify the target audience for your phased implementation	
	Develop a plan to market the wins of your phases to the user community	
	Develop a test strategy and plan	

Table 12. Train Users

Date Completed	Task	Task Owner
	Develop role-based training for all levels of users, executives, and managers	
	Identify the best method of training delivery for each user group based on learning objectives and corporate culture	
	Develop training materials with input from users	
	Provide specific training to management on how to use the new system to drive results and manage performance	
	Create a support structure for the training and education of the users	
	Establish a plan to reinforce and build proficiency with the new behaviors and tools	
	Put in place ongoing training and new hire training	

Table 13. Measure Progress

Date Completed	Task	Task Owner
	Identify three to five metrics per functional area	
	Determine how you will measure against your baseline	
	Develop a plan to address gaps in performance and business results	
	Develop a plan for ongoing and continuous measurement of the use of your Siebel application	

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