10 Things to consider when preparing for a Student Database Implementation

1. Build capacity in our office staff at least 6 months before beginning an implementation

I have yet to see an Admissions and Records office that wasn't operating at 100% capacity. The hiring and training process for additional staff takes at least 6 months. Often there is budget in a project for "backfill". Don't think "backfill" – think "frontfill" – in other words, if you wait until it is time for your key people to start working on the implementation to bring in reinforcements, you will be behind already.

2. Identify and train the key individuals (module leads) on the new system as soon as possible

One of the most important things to do in preparation of a new system is a 'fit-gap' analysis. You will need to determine as soon as possible if there is functionality that is missing from the new software which will require either a change in your business practice, or development of mods/enhancements/bolt-ons to the software.

3. Empower the module leads to make decisions

This is the time to 'blow up the boxes' and give your module leads the freedom and flexibility to improve the business process. Let her or him make decisions about which codes to use, how admissions processing will work, which checklist items to use, etc. without a lot of sign-off, approval or red tape. Staff members need to 'own' the process. Avoid the temptation of simply carrying your existing process over to the new system because 'that's how we always have done things'.

4. Set realistic expectations

Chances are good that it will take a while to get up to speed on the new system. Start early in communicating these changes to students, staff and faculty. Example: If your faculty members are used getting an updated class roster an hour before his/her class starts, let them know in advance if that expectation is unrealistic initially. Examine deadlines for adding classes, dropping classes, transcript delivery, etc. to see if changes need to be made at least in the initial term on the new system.

5. Submit programming requests as early as possible

In a typical implementation, your IT staff will be buried by conversion issues, last minute gaps in functionality, and software upgrades. In a typical ERP implementation, the Student System is considered "just another module" – on par with Finance, HR, Financial Aid, etc., even though it is clearly the most important one. Requests for reports and mods/enhancements/bolt-ons should be submitted as soon as possible – preferably no later than 8 months before your module goes live in order to be developed, documented, and provide training – otherwise you will be forced into often manual work-arounds while the dust settles.

6. Sequester staff while they work on implementation

Nobody can do two jobs well simultaneously. Staff working on the implementation should have a workspace and a 'home' in a project office completely apart from their regular workspace to minimize interruptions and ensure that progress is being made. There are always things to do – documentation, data cleanup, training and testing.

7. Build trust with your implementation partner

Identify the capabilities of your consultant as soon as possible. If you can't work with him/her, or are assigned a rookie, demand a replacement early in the project. Consultants often work by the hour and have to document their work as well as deal with travel and hotel rooms. Make sure his/her time is spent productively.

8. Be prepared for frequent software changes

If you are coming from a home-grown system, the most challenging thing to manage is the frequency with which upgrades are delivered. With Banner, a major version release is delivered about every 2 years. Since a typical implementation takes 2 years, often the release that you start with and train on is not the same as the one you will take live. Learn to read the release notes and be flexible. Avoid requesting modifications to the software that will be delivered in a future release – modifications once made often never go away.

9. Plan on doing your own documentation and training for your office

Software vendors will be happy to charge you for training your staff. Often this training is little more than how to navigate the screens, and steps to follow to do a particular task – say, register a student. The module lead will need to know the basics, and take the training and documentation to the next level, incorporating your local business practices: which codes to use, how the system will work with your schedule and your catalog, how you plan to implement certain activities (adds, drops, holds), etc. Have this localized training done as close to 'go live' as possible so that you are working on the most current version of the software, and so the training is more likely to be remembered.

10. Pay attention to communications

Beware of unproductive meetings, but be sure that everyone is informed about the progress from every module. Know about issues in other modules, and be prepared to respond. For example – if Financial Aid is slow in getting applications processed/converted, payment deadlines need to be extended. If academic history is slow in getting converted, prerequisite checking and repeat checking can't be done, and transcripts may need special review.