

# Employer Panel - Strategic & Successful Implementation Practices



# Strategic & Successful Implementation Practices

**Moderator**

*Erin Breyman*

*Consulting Actuary, Principal Financial Group*

***Meet the Panel . . .***



***Javon Thurman***  
*Director of Retirement,*  
*Providence St. Joseph Health*

Why my “dust” never quite settles...

- ▶ My background
- ▶ Mergers, acquisitions, and affiliations



# *Wendy Rittereiser*

*HR/Benefit Manager, City of Renton*

My background

Software Projects

- ▶ HR/Payroll systems
- ▶ Recruiting, applicant tracking, and onboarding (integrated)
- ▶ Learning Management, Performance Management (integrated)
- ▶ Vendors/Record keepers



***Tom Murray***

*Senior Consultant, Point B*

How did an HR guy become a system implementations guy?

- ▶ My Background
- ▶ How technological change subverted my early aspiration to avoid technology at all costs



# *How to decide to implement or upgrade a system*

*Javon Thurman*

One or more of the following events generally lead to a need for change:

- ▶ Growth demands
- ▶ Seeking efficiencies
- ▶ Obsolescence of existing system
- ▶ Strategic shift
- ▶ New technology vision



# *How to choose a system or implementation partner*

*Wendy Rittereiser*

Align with clearly defined strategic goals.  
Consider:

- ▶ Cost
- ▶ Functionality
- ▶ Service Levels
- ▶ Communication and Educational Material

Involve stakeholders (our system)

Solicit guidance and check references



# *Creating a Project Plan, and Putting your team together*

*Tom Murray*

- ▶ Tips for creating a successful Project Plan
  - ▶ Start with a succinct Project Charter
  - ▶ Build the plan collaboratively and expect it to evolve
  - ▶ Focus on work streams and milestones
  - ▶ Establish a working rhythm
  - ▶ Integrate Change Management into your plan
- ▶ What to consider when building your team
  - ▶ Leverage vendor and internal expertise/strengths
  - ▶ Dedicate resources whenever practical
  - ▶ Ensure your governance structure is clear and accepted
  - ▶ Who is the customer and how are *they* integrated?





# *Javon Thurman*

## Top things I've learned during implementations

- ▶ Respect the entire process from beginning to end
- ▶ Make sure you have the right people on your team
- ▶ Don't limit your implementation plan based on only what you know
- ▶ Speak up, ask questions, and be transparent
- ▶ Make sure your User Acceptance Testing (UAT) script is thorough



# *Wendy Rittereiser*

Top things I've learned during implementations

- ▶ Have very specific Service Level Agreements with vendor and implementation partner
- ▶ Make sure team roles are clearly defined, with adequate release time for their “day job” internal roles and responsibilities
- ▶ Have contingency plans
- ▶ You can't over plan end user training /roll out



# *Tom Murray*

## Top things I've learned during implementations

- ▶ Strategy drives systems, not the other way round
- ▶ Prepare for it to feel messy and a bit personal
- ▶ If you didn't like your vendor partner(s) before, a systems implementation isn't going to bring you closer together
- ▶ Budget time to fix the business process
- ▶ Stick to a date and have a plan for the post-implementation period



# *Audience Questions*

We've asked the panel to address

- ▶ How they decide to implement or upgrade
- ▶ How they choose a system or partner
- ▶ Creating a project plan and team members
- ▶ What they've learned

What else would you like to know?

