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The Six Biggest Mistakes Companies Make When They Upgrade Technology

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As an information services professional I've spent the past decade or so helping companies with their technology. Over that time I've come to identify 6 major mistakes that they tend to make when they install or upgrade new technology.

#1. They don't have a goal.

It's important before you even consider upgrading your technology to ask this question: What problem are we solving? Too many companies forget what business they're in and run around installing fancy new systems that don't address any specific needs.

Sometimes they're talked into it by vendors or consultants; sometimes it's the brainchild of a computer-savvy manager or staff member. Far too often the result is a lot of money spent for new systems and no increase in productivity.

If you don't have a goal, you'll never reach it. Back home in Indiana folks say "If you don't know where you're going, pull over and stop 'cause you're there." This is rarely more true than in technology where you are constantly bombarded with possible routes - in the form of cool toys - but unless you have a destination it makes no sense to even start the car.

How can I avoid making this mistake? Start by identifying the problem. Write it down. Write down the proposed answers. Review the problem (and proposed solutions) with the users and with your information services people (or consultants).

Once you have a clearly defined (and agreed upon) problem and solution, set a timetable. Make it realistic. This can be one of the hardest parts of this step because you don't want to rush things and end up with a hastily implemented, and poorly constructed, solution, but at the same time you can't drag your feet too much or the technology will change right out from under you and you may find that your preferred solution has been discontinued in favor of a new and improved (read that "more sophisticated and expensive") solution.

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#2. *They don't talk to their users.*

Too many companies get a great idea for a new technology, throw the switch and roll it out to their users without even much warning to the users that it's going to happen. As a result there is confusion, resentment, fear and a LOSS of productivity.

How can I avoid making this mistake? Don't just impose change from the top down or you'll end up with users who resent and are intimidated by the new technology.

Ask them what they need. Ask how they will use it. Have them compose a "wish list". Observe their procedures. You'll find that the users will accept the new systems much faster and easier if they have some input into its selection/creation.

If you're in a large company consider putting together a users group of various staff members. Try to include at least two members of each category (executive, manager, support staff, accounting, etc.) and don't just pick the ones who know a lot about technology. Oftentimes the most valuable input will come from that manager or secretary who is awkward with the computers.

Have them meet each month and ask them to talk about how the technology is (or isn't) working for them. Have them suggest improvements. It's important that you listen to their input and let you know that you value their contributions.

#3. *They don't do their homework (or pay the smartest kid in class to do it for them).*

I often see firms that buy a solution they don't understand. What is it? How does it work? Why do we need this again? Many times they see a flashy ad or get a presentation from a salesman and sign the papers in the excitement of the moment.

How can I avoid making this mistake? Do your research. Visit the Internet sites for the products you're interested in. Visit the sites of some of their competitors. Read the trade magazines and try to keep a handle on what's happening in the industry. Talk to the users (see #2) and vendors. Attend demos and seminars. You'll probably have to start learning about the technology at least 4-6 months before you plan to upgrade or the hill will be too steep to climb.

If you can't (or don't want to) do the research yourself, find a consultant that you feel comfortable with. Get recommendations from other firms in your area of people they've enjoyed working with. Ideally the consultant should be familiar with the solutions you're interested in, but shouldn't sell those solutions themselves (that way he has no financial interest in selling you something you don't need).

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Never hire a consultant that you don't trust completely. Your consultant should be able to explain the basics of the relevant technology to you in language you can understand and, most importantly, should be able to explain the expected benefits to you.

#4. They don't document everything.

At one firm I worked for, I discovered that they had an entire floor of the building wired for network cabling but didn't have a map or any other documentation about the cabling. All they had was plugs in the walls and loose wires in the computer closet. As you can imagine troubleshooting cabling problems became quite an adventure. It's far too common to ask what kind of hardware is in use and have them not know for sure.

How can I avoid making this mistake? The solution is easy, but can be tedious. Insist upon complete documentation from your vendors. Maps of cabling. Labels on everything. When you deploy new equipment keep a file that indicates serial numbers and specifications (RAM, hard drive, processor, operating system, etc.). Often you can get that information from the invoice you received for the machine.

Keep a list of what software you have in use, how many licenses you own, and what versions you're running. This documentation can make troubleshooting MUCH easier down the road.

#5. They skimp on training.

This is a VERY common error. It never fails to surprise me when I see a firm that will spend \$50,000 on computer equipment but won't spend \$500 to train the users.

How can I avoid making this mistake? The most important part of your system is the user - upgrade them! Would you fly an airline that advertises that "All of our pilots have driver's licenses and we have a copy of "Big Planes for Dummies" in every cockpit!" I doubt it...yet many of you are flying your firms with crucial personnel who haven't had even 20 minutes worth of training in the products that you depend upon to get your work done.

Even long after the installation training can be productive. You may think that your secretary knows the ins & outs of your word processor, but what if a 2-hour class could teach him or her new tricks or secrets to get things done faster? If these new tricks saved them just 12 minutes a day that would be an entire HOUR each week that they'd gain. In a month they'd have recouped all of the time invested in the class, twice over. This goes for executives as well, by the way...

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#6. They don't follow-up.

This comes back to talking to your users. If you don't look out the window how do you know if you reached your destination? Don't find out 6 months later that the staff hates the new software or that the new printers don't work properly.

How can I avoid making this mistake? After the upgrade is in place you need to contact your users and ask them if they're happy. Try to be there when they first use it to get their initial reaction. Check in with them again the following day. Check in again the next week...and again weekly or bi-weekly for the next month or two. Look back at your written "goal" from #1 and see if you've solved your problem. If you didn't, figure out why and make adjustments. Users will often forgive you if you find and fix problems quickly they often won't forgive you if you give them a "solution" that doesn't work and then leave them to deal with it on their own.

Many times you'll find that the problems are really "pilot error" and can be corrected with more (or better) training. Sometimes the problems will be equipment or software problems and finding them in the first days or weeks can mean the difference between getting your vendor to replace the inadequate product with something more suitable and getting stuck with it for the long term.

Preventing these mistakes takes a little effort but it's not expensive. What's expensive is making these mistakes and ending up with a system that you paid considerable money for and that leaves your users frustrated and your productivity down.

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