Implementation Planning Questions

Introduction
This document is designed to help you plan your data integration project before engaging with any vendors. It seeks to create a framework in which you understand the value to be gained and many of the requirements that must be met, to realize better day-to-day operations for your organization. From here we recommend you start the process of choosing an integrator to help make your project a success.

General Planning:
• What is the scope of this integration project?
• What efficiencies do you want to gain through integration?
• What data needs to move and to where?
• What are the changes you expect?

Personnel:
• What activities will you be responsible for internally, what will you outsource?
• Who will lead and who will coordinate the project internally? Externally? For each vendor?
• Do you have adequate technical staff resources?
• What kind of technical & human support will be necessary and who will provide?

Communication:
• How will progress & decisions be documented?
• What process will you use to communicate?
• How will you set and manage expectations?
• Are there legal and/or confidentiality requirements to consider?

Political:
• Who are the stakeholders in your school/district? What roles do they need to play?
• Who are the thought leaders and gatekeepers that need to be brought on board?
• Who owns the data today?
• What are the existing rules/processes for data management today?
• Are there any role-based security policies in place today?
• How will current data owners’ jobs change with integration?
• Are there Union or work rule issues involved?

**Technical:**

• What is your existing security model?
• What remote support methodologies will you utilize?
• What impacts on connectivity & network load are expected?
• What are your hardware requirements? What do you have and what will you need to purchase?
• What are your security needs?
• Are there technical issues that will necessitate staff training or consultants? (e.g., certificates)
• Are there other application updates or service updates to accommodate?
• What standards do existing systems support? (list by system)
• How will existing site “rules” impact the integration? (e.g., “inactivate” vs. “no show” attendance)
• Are there custom data mapping needs?

**Things to do:**

• Formal analysis of existing work and data flow.
• Create impact statements.
• Retrain staff on integrated systems.
• Be aware of internal politics.
• Plan bi-monthly status meetings.
• Define process for error reporting.
• Keep an open mind about problems.