Life After Implementation

White Paper
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About the Author – Chris Kahler, EMMsphere CEO

Chris has over 25 years of experience leading marketing technology implementation projects and post implementation managed services programs. His experience includes managing enterprise software applications as an employee for Nabisco's Planters LifeSavers subsidiary and as a marketing technology consultant.

In August 2003 Chris founded EMMcare and led the company to become a leading provider of implementation and managed services for Marketing Resource Management and Digital Asset Management solutions. In September 2014 he became the CEO of EMMsphere after merging EMMcare with MarketSphere Consulting. Chris currently remains as EMMsphere's CEO and resides in Winston-Salem North Carolina.

Abstract

The objective of our "Life After Implementation" white paper is to help you plan and prepare for the resources, processes and governance you'll need for post implementation success. The discussion that follows will provide insights into the day-to-day activities that follow your initial implementation project and will also help guide the decisions you need to make prior to and during your initial implementation project to ensure smooth sailing throughout your post implementation journey.

When planning to build a new home, it is critical that your architect and builder ensure that you understand the day-to-day living conditions, conveniences and the day-to-day operating challenges you will face once you move into your new home. Having a clear and accurate vision of living in the that "to be built" new dream home is the first step to plan and prepare for moving in, living in, maintaining and improving that home over time.

Over the life of your "live" (operational) system, **you will spend more time, money and effort** than you did during the initial system implementation project. An initial implementation project has a defined begin and end date with a relatively short duration of time (4 – 12 months depending on the scope). In contrast, post implementation is an ongoing operational program that will require resource and financial investments throughout the entire life of the solution.

Post implementation, change happens! Organizations change, business needs change, platforms change, processes change, users change and digital assets change. However, organizations quite often underestimate the volume of the incoming change requests, expansion initiatives & enhancement projects and consequently, are not armed and ready for the day-to-day operational activities. Whether you plan to insource, outsource or utilize a mixed model for these post implementation activities, you'll need a Solution Management Plan to manage and execute your future solution roadmap and the ongoing day-to-day operations.

The term "Solution Management" is mentioned throughout this paper and as such deserves a quick definition. **Our definition is in the context of marketing technology initiatives,** specifically Digital Asset Management, Marketing Resource Management and Product Information Management solutions.

Solution Management is the program management and delivery function accountable for all post implementation solution enhancement releases, expansion projects, ongoing change management, training and the day-to-day solution and user support activities.

The purpose of the Solution Management function is to ensure your solution delivers value to the stakeholders and users throughout the entire life of the solution. This is accomplished by ensuring your solution, users and digital assets remain in perfect alignment when change happens.

Solution Management consists of a service delivery framework, standard operating procedures and governance processes. A Solution Management program has three primary goals:

- *Enhance, expand and support your "live" __solution__ to ensure it remains aligned to your business*
- *Engage, empower and enable your __users__ to ensure they remain aligned to your solution*
- *Manage and protect your __digital assets__ to ensure your marketing content remains aligned to your brand*

It's important to note that the definition above emphasizes **solution, users and digital assets**. These components, when maintained in perfect alignment, drive the user advocacy and adoption you'll need to get every drop of value out of your marketing technology solution.

Our "Life After Implementation" discussion explores the following topics:

1. The similarities and differences of the initial implementation project in comparison to a post implementation Solution Management program. The comparison will be specific to the challenges, required resources, and the types of activities performed.

2. What is Post Implementation Solution Management?

   o What are the key Solution Management activities?

   o What is a Solution Management Plan?

      ▪ Objectives & Goals
      ▪ Foundational Elements
      ▪ Derived Benefits

   o Approach to Developing & Implementing a Solution Management Plan

Assessment Framework & Approach

Our implementation vs. post implementation comparison approach will examine the three key components of a marketing technology initiative; the **solution**, the **users** and the **digital assets**. These are considered "the three" key components because all three will be constantly changing as soon as you flip the switch to "On", rollout your marketing technology solution to your users and begin sharing your digital marketing content within your organization, with your partner ecosystem and with your external marketing content consumers.

Solution
Initial Implementation vs. Post Implementation
Activities
Scope
Challenges

Users
Initial Implementation vs. Post Implementation
Activities
Scope
Challenges

Digital Assets
Initial Implementation vs. Post Implementation
Activities
Scope
Challenges
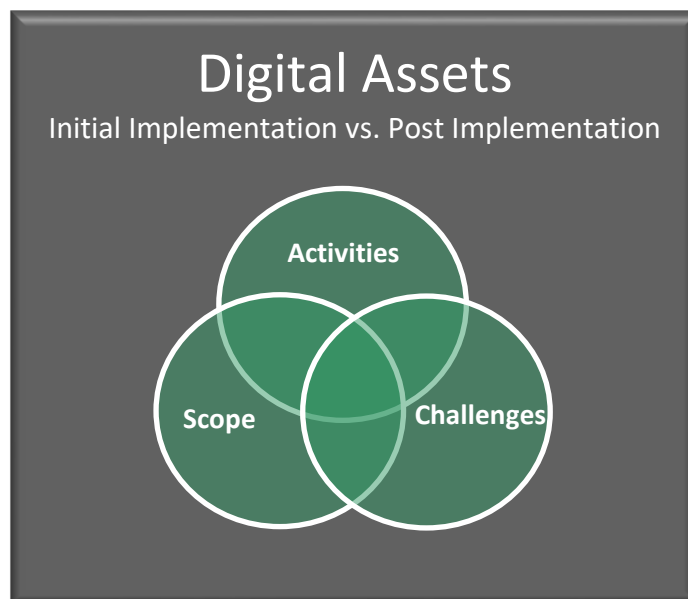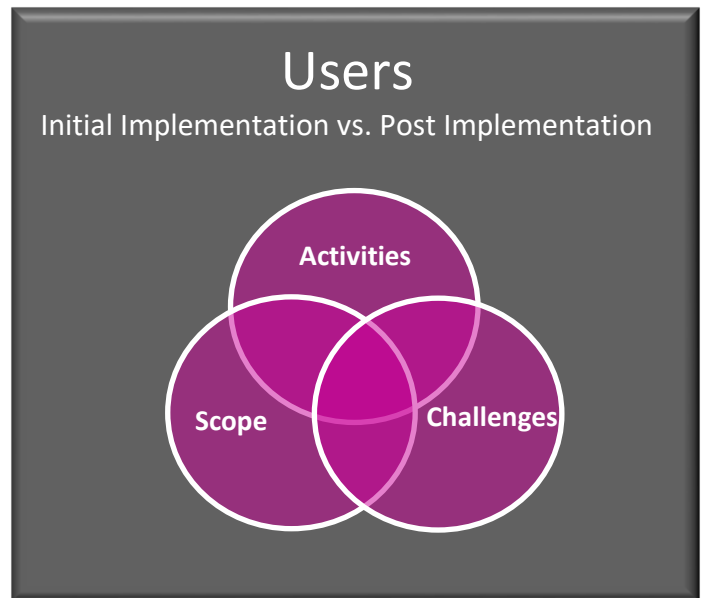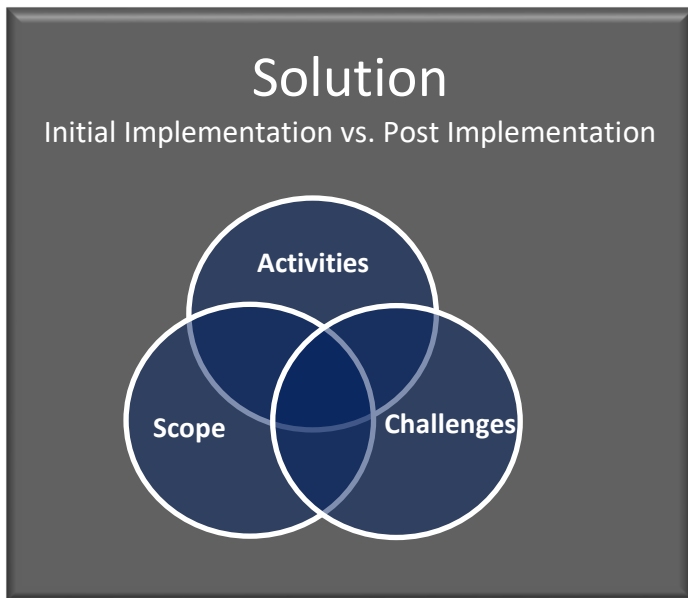
We will examine each of the three components by comparing the inherent challenges and scope of associated activities conducted during the initial implementation project and throughout post implementation journey.

	Comparison Focus Areas	
Component	**Initial Implementation Project**	**Post Implementation**
#1 Solution	• Initial Design, Build & Rollout Project	• Expansion Projects • Enhancement Projects • Maintenance (Break Fix) Releases • Day-to-day Solution Administration
#2 Users	• Awareness, Understanding & Buy-In	• Awareness, Understanding & Buy-In • Utilization & User Adoption
	• Rollout Training	• New Release Training • New User Onboarding Training • Booster Training • User Support
#3 Digital Assets	• Governance Model Development • Taxonomy & Metadata Definition • Digital Asset Migration	• Governance Model Adherence • Taxonomy & Metadata Change Mgmt. • Digital Asset Librarian Operations
	Activities, Challenges & Scope	

Implementation vs Post Implementation Assessment

Summary

Before you began your initial implementation, you developed a structured project plan, assembled a project team consisting of stakeholders, subject matter experts and technical resources with a project manager and a business sponsor. It just makes sense to incorporate these same best practices throughout your solution's post implementation life. Why? Because, you'll need to manage and execute similar activities performed during your implementation project and in addition will also need to manage operational activities.

Post implementation <u>is Similar</u> to the Initial Implementation Project

Your initial implementation project had a limited budget, a constrained project schedule and only addressed the top priority business needs, and as such had a limited project scope. Post implementation, you'll still need the same **project-oriented** delivery capability (project management, design, build, deployment and training) to handle the solution enhancements, expansion projects and new user onboarding initiatives that were initially out of scope and now placed on your future solution roadmap.

Post implementation <u>is Different</u> than the Initial Implementation Project

Post implementation, you also have the added complexities associated with operating within a "live" production system. Users are now onboard performing their day-to-day work and your digital assets are constantly changing and being utilized within a highly governed rights management environment. It's now time to activate your post implementation **operational** processes to handle the incoming service requests that will be arriving at your doorstep (incident resolution, system administration, user support, booster training, new user onboarding and DAM Librarian support). You didn't have to deal with these operational issues during your initial implementation project. You now need operations-oriented resources, processes and infrastructure. Most challenging will be integrating your post implementation **project-oriented** activities with your day-to-day **operational** activities and being able to execute both at the same time within a "live" environment.

Component #1 – Your Solution

Definitions

Term		Definition
Initial Implementation		The implementation initiative following the **purchase of a new software platform or a "re-boot", re-implementation of an existing platform** that requires a complete overhaul and requires a "start from scratch" perspective and design. Deployment will be into a new production environment **without** existing users.
Post Implementation	**Solution Expansion Projects**	Initiatives that are specific to the implementation of 1.) **New platform modules or integrations** that were not part of the initial implementation project or a previous solution expansion project or 2.) **New processes and onboarding of new organizations** that were not part of the initial implementation project or a previous solution expansion project. These are **planned projects** that have been included within the "future" strategic solution roadmap. These expansion projects are typically excluded from the initial implementation to limit the scope of the initial implementation project based upon business priorities and time constraints. Deployment will be into a "live" production environment **with existing** users.
	Solution Enhancement Projects	Initiatives that improve and optimize the current solution footprint's functionality through **new functional configurations or new technical customization development** activities. These are **planned projects** that are normally initiated due to stakeholder and user feedback from actual use of the solution. Deployment will be into a "live" production environment **with** users.
	Solution Maintenance (Break/Fix) Releases	**Unplanned** solution support releases that **resolve reported incidents**. The root cause of the incident could be specific to a defect within the solution platform, the functional configuration, an integration or customization.

Solution-Centric Challenges

The following solution-centric challenges are specific to the complexities you will face during post implementation. We are not by any means saying that an initial implementation project does not have its own set of challenges. However, this paper's focus is on highlighting "Life After Implementation" and does so by emphasizing the **incremental** challenges you will be faced with during post implementation.

Expanding, enhancing, maintaining and supporting a "live" solution (post implementation) has two significant additional challenges that did not exist during the initial implementation project. First, the initial implementation **did not have any users onboard** performing their day-to-day business tasks. However, post implementation, users are onboard, have responsibilities and tasks to perform within the system and do not want to be disrupted for any reason, and if they are disrupted, you'll hear about it from them and from their managers!

Secondly, when making changes to a "live" system, post implementation, you must consider the existing design blueprint and the complexities specific to deploying into the "live" system. The "live" environment has **existing configurations, code, integrations and customizations** that will require significant design, implementation, testing and deployment planning considerations. You will need to ensure the deployed changes do not disrupt the current system's functionality or the business-as-usual operations.

Think of your initial implementation project like building a new house. The new home construction project is a major investment, it needs to be designed and constructed **but the builder is building on an empty lot and your family isn't living in it while it's being built.** Now fast forward after you have moved into your home. This is post implementation. You are now living in, enhancing, expanding and maintaining your home. Building a major addition (expansion or enhancement) to your house **that you are living in** introduces significant constraints to your construction contractor. These constraints require planning, design, deployment and user rollout considerations that were not required during the initial implementation project. These unique planning considerations are required to ensure any inconvenience to you and your family are avoided or minimized.

Point being, designing, implementing and deploying changes to a "live" system requires more complex planning and coordination between your solution design, solution support, change control and change activation teams to ensure the day-to-day business operations continue as usual without any disruptions.

Solution-Centric Activities

SOLUTION-CENTRIC ACTIVITIES	Initial Implementation Project	POST IMPLEMENTAION		
		Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
Vision & Destination Statement	✓	✓	✓	⊗
Project Plan Development & Approval	✓	✓	✓	✓
Project Kickoff	✓	✓	✓	✓
Communications Plan & Approval	✓	✓	✓	✓
Requirements Definition & Approval	✓	✓	✓	⊗
Design Specification & Approval	✓	✓	✓	⊗
Configuration & Development	✓	✓	✓	✓
Iterative Prototype Development & Demonstrations	✓	✓	✓	⊗
Test Plan Development & Approval	✓	✓	✓	✓
Test Script Development	✓	✓	✓	✓
Unit & System Testing	✓	✓	✓	✓
Regression Testing	⊗	✓	✓	✓
User Acceptance Testing & Acceptance	✓	✓	✓	✓
Project Close Meeting	✓	✓	✓	✓
Upload/Place Project & Solution Docs to Central Storage	✓	✓	✓	✓
Solution Administration	✓	✓	✓	✓
Change Control Governance Plan Development & Approval	✓	Utilized for all post implementation solution changes but developed and approved prior to post implementation		
Change Request Submission & Review w/ Change Board	⊗	✓	✓	✓
Change Control Governance Adherence Monitoring & Audits	⊗	✓	✓	✓

Solution-Centric Scope

The resources, duration and frequency comparison below is "relative" to the initial implementation project and is intended to provide comparative information only. For example, the Business Function Owner's participation is twice the amount (10) during an initial implementation compared to a post implementation solution enhancement project (5).

		Initial Implementation Project	POST IMPLEMENTAION		
			Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
Resources	Business Function Owner Participation	10	10	5	1
	Business Function Manager Participation	10	10	5	1
	Key User Participation - SME's & Power Users (Planning, Readiness, Design & UAT)	10	10	5	1
	End User Participation (UAT)	10	10	5	1
	Solution Design Lead Level of Effort	10	10	5	1
	Configuration & Technical Development Lead Level of Effort	10	10	5	1
	QA/Testing Lead Level of Effort	10	10	5	1
	Project Management Level of Effort	10	10	5	1
Planning	Ability to Anticipate & Plan	10	10	5	1
Duration	Project Start to End	Months	Months	Weeks to Months	Days to Weeks
Frequency		1 Time	1 /Yr.	2-4 / Yr.	As Required

Component #2 – Your Users

User-Centric Challenges

Let's begin with the good news prior to discussing the challenges of developing and executing a plan to ensure your users adopt, embrace and utilize your solution and drive every ounce of value out of the solution you have provided them.

The good news is, **there should be no surprises**. You already know users will need timely and reliable support. You know technology has functional limitations and that even the best technology has defects. You know some functional requirements will not be implemented exactly to the user's specification. You also know it is human nature to be change adverse and you know change happens. Organizations change, business needs change, platforms change, processes change, users change and digital assets change. Your user advocacy and user adoption strategy and tactics will dictate how these changes will impact your users relative to leveraging and adopting your solution.

However, having led large enterprise marketing technology implementation projects and post implementation programs for over 25 years, I have seen that organization's #1 challenge is planning for and incorporating these user-centric planning considerations within their resourcing plan (financial and human resources) for both the implementation project budget and for the ongoing post implementation solution management program. I am not suggesting that organizations are not aware of the importance of user advocacy and adoption. I am emphasizing that **these critical user-centric activities are consistently under-funded and under resourced** to execute on delivering "the promise" to the stakeholders and users. The promise being that the stakeholders and users will adopt, utilize and evangelize the solution to drive incremental value to the business and will do so in a manner that is significantly more efficient and effective than their current state operating model.

So why do marketing technology programs typically under-fund the critical user-centric activities? Too often, the technology becomes the focus and gets placed in the driver's seat. Consequently, the users get pushed to the back seat and are expected to trust that the technology will get them to their "promised" destination. This analogy may seem extreme, I agree, but it does help emphasize a simple but very import point; "**Without user advocacy and user adoption your marketing technology initiative will fail, regardless of how great the technology is**". You need to switch drivers and hand the keys to the users!

This paper is focused on providing insights into the importance of developing a post implementation Solution Management Plan to deliver on "the promise". However, it is important to understand that the foundation of building post implementation user advocacy and adoption **must begin during the initial implementation project**. You must put the users in the driver's seat Day One when you begin the planning activities for your implementation project. Think of the initial implementation project as having two distinct but interdependent workstreams. Workstream #1 is the design, build and deployment of the solution. Workstream #2 is all the user-centric activities to build user awareness, understanding and buy-in specific to the goals, objectives and success criteria of your marketing technology initiative. By establishing user advocacy during your implementation

project, you will have the foundation needed to nurture and grow user adoption during the post implementation journey. User advocacy begins during the implementation project and user adoption can only happen post implementation when users are onboard, utilize the solution, embrace it and evangelize the solution within the user community.

Bottom line, you can't dictate ("push") user adoption, you must create a demand for your solution (user adoption "pull"). Demand drives a sense of ownership within the user community and ownership drives user adoption. I will end this discussion with a simple but very interesting point that should be made to every stakeholder and project team member. Your organization has committed or is getting ready to commit a significant amount of time and resources to your marketing technology initiative. **This investment is being made to support your marketing organization's mission to generate demand for your company's products and/or services**. It just makes sense to do the same (to create demand) for your marketing technology solution. This means you need to market your solution to your stakeholders and users. Approach your marketing technology initiative like a marketer that is hyper focused on creating, driving and sustaining extraordinary demand for your marketing technology solution. Establish user advocacy (awareness, understanding and buy-in) during the initial implementation project, enable your users during rollout then repeat over-and-over again during your post implementation journey as you continuously expand and enhance your solution footprint.

User-Centric Activities

		Initial Implementation Project	Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
User Advocacy & Change Management	Assess Key User & Stakeholder Awareness, Understanding and Buy-In (Prior to Rollout)	✓	✓	✓	⊗
	Survey & Assess User & Stakeholder Utilization & Adoption	⊗	✓	✓	✓
	Communications Plan Development & Approval	✓	✓	✓	⊗
	Communications Plan Execution	✓	✓	✓	✓
Training	Training Plan Development	✓	✓	✓	⊗
	Training Material Development	✓	✓	✓	⊗
	Rollout Training	✓	✓	✓	⊗
	Booster Training	⊗	✓	✓	⊗
	New User Onboarding Training	⊗	✓	✓	⊗
User Support	User Support Transition & Knowledge Transfer	✓	✓	✓	✓
	Develop/Maintain & Approve User Support SOPs	✓	✓	✓	✓
	Test User Support Request Submission & Response Processes	✓	⊗	⊗	⊗
	Live User Support – User Support Request Submission	⊗	✓	✓	✓
	Live User Support – Respond & Resolve	⊗	✓	✓	✓
	Live User Support – Change Control Escalation	⊗	✓	✓	✓
	Live User Support – Platform Escalation Management	⊗	✓	✓	✓
	Live User Support – Service Level Management	⊗	✓	✓	✓
	Live User Support – Ticket Status Reporting	⊗	✓	✓	✓
	Assess User Support Request Trends	⊗	✓	✓	✓
	Develop Booster Training Recommendations	⊗	✓	✓	✓

User-Centric Scope

The resources, duration and frequency comparison below is "relative" to the initial implementation project and is intended to provide comparative information only. For example, the Business Function Owner's participation is twice the amount (10) during an initial implementation compared to a solution enhancement project (5).

User Advocacy & Change Management Activities

		Initial Implementation Project	POST IMPLEMENTAION		
			Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
Resources	Business Function Owner Participation	10	10	5	1
	Business Function Manager Participation	10	10	5	1
	Key User Participation - SME's & Power Users (Planning & Workshops)	10	10	10	1
	End User Participation (Surveys)	10	10	10	1
	Communications Lead Level of Effort	10	10	5	1
	Project Management Level of Effort	10	10	5	1
Planning	Ability to Anticipate & Plan	10	10	5	1
Duration	User Advocacy & Change Management Activity Start to End	Months	Months	Weeks to Months	Days
Frequency		1 Time	1 /Yr.	2-4 / Yr.	As Required

Training Activities

		Initial Implementation Project	POST IMPLEMENTAION		
			Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
Resources	Business Function Owner Participation	10	10	5	N/A
	Business Function Manager Participation	10	10	5	N/A
	Key User Participation - SME's & Power Users (Training Plan)	10	10	5	N/A
	End User Participation (Training Classes)	10	10	5	N/A
	Training Lead Level of Effort	10	10	5	N/A
	Project Management Level of Effort	10	10	5	N/A
Planning	Ability to Anticipate & Plan	10	10	5	N/A
Duration	Training Project Start to End	Months	Months	Weeks	N/A
Frequency	Training Delivery	1 Time	1 /Yr.	2-4 / Yr.	N/A

User Support Activities

		Initial Implementation Project	Post Implementation
Resources	Business Function Owner Participation	10	5
	Business Function Manager Participation	10	5
	Key User Participation - SME's & Power Users (Monitor & Assess User Adoption)	10	5
	User Support Team Lead Level of Effort	5	10
	Project Management Level of Effort	5	10
Planning	Ability to Anticipate & Plan User Support Needs	10	10
Duration	User Support Activities Start to End	N/A	Ongoing

Component #3 – Your Digital Assets

Digital Asset-Centric Challenges

Digital Assets, like all assets your company owns, are utilized to produce financial value for your brand. As such, your digital assets need to be **protected** by policies (rules and guidelines) and **managed & enriched** by standard operating procedures (the implementation of policies into operational activities) to ensure your digital assets empower and monetize your brand.

Keep in mind, digital assets are not static or single purposed. Digital Assets are dynamic and evolve over time. They are utilized for multiple purposes, by multiple functions and by multiple people (internal and external to your organization). A digital asset's journey has multiple destinations, multiple checkpoints and continuously repeats its journey over and over when modified, repurposed and shared with other systems and consumers. The constant threats to digital assets and brand alignment exist throughout a digital asset's entire lifecycle. When your digital assets are not in "lock-step" with governance policies and procedures, risk increases for your organization, the value (of your digital assets) decreases, and your brand will feel the impact.

This dynamic and fluid nature of digital assets is the basis of the challenges you will be faced with specific to protecting and managing your digital assets. So, what are the key best practices you can leverage to ensure you are armed and ready for these digital asset-centric challenges?

Like the earlier discussion specific to establishing a user advocacy and user adoption foundation Day One of your initial implementation project, you must do the same to protect and manage your digital assets. This means developing a digital asset compliance and governance model (foundation) prior to rolling out your marketing technology solution. You can't expect content developers and end users to comply if you haven't developed and communicated the policies (rules). In addition, you need to go one step further and implement those policies into standard operating procedures to detail the specific activities and assigned responsibilities to be performed to comply to the digital asset management policies.

Digital Asset-Centric Activities

		Initial Implementation Project	Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
Digital Asset Governance & Compliance	Current State Governance Assessment	✓	✓	✓	✓
	Future State Governance Definition/Recalibration	✓	✓	✓	✓
	Governance Issues, Obstacles and Risks	✓	✓	✓	✓
	Develop Governance Activation/Enhancement Plan	✓	✓	✓	✓
	Develop/Enhance Governance **Policies & Procedures**	✓	✓	✓	✓
	Develop/Enhance Governance **Communications Plan**	✓	✓	✓	✓
	Develop/Enhance Governance **Training Plan**	✓	✓	✓	✓
	Governance Communications Execution	✓	✓	✓	✓
	Governance Training Delivery	✓	✓	✓	✓
	Governance Policy & Procedure Activation	✓	✓	✓	✓
DAM Operations	DAM Information Framework Design/Design Enhancements (Taxonomy, Metadata, Workflow & Search)	✓	✓	✓	✓
	Librarian Support: Digital Asset Migration/Ingestion	✓	✓	✓	✓
	Librarian Support: Ad Hoc & Planned Service Request Fulfillment	⊗	✓	✓	✓
	Librarian Support: Compliance Auditing & Issue Management	✓	✓	✓	✓

Digital Asset-Centric Scope

Digital Asset Governance & Compliance

The resources, duration and frequency comparison below is "relative" to the initial implementation project and is intended to provide directional information only. For example, the Business Function Owner's participation is twice the amount (10) during an initial implementation compared to a solution enhancement project (5).

		Initial Implementation Project	POST IMPLEMENTAION		
			Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
Resources	Business Function Owner Participation	10	10	3	As Required
	Business Function Manager Participation	10	10	3	As Required
	Content Owner Participation (Policy & Procedure Development)	10	10	3	As Required
	End User Participation (Training Classes)	10	10	3	As Required
	Compliance Lead Level of Effort	10	10	3	As Required
	Communications Lead Level of Effort			3	As Required
	Compliance Training Lead Level of Effort	10	10	3	As Required
	DAM Librarian	10	10	3	As Required
	Project Management Level of Effort	10	10	3	As Required
Planning	Ability to Anticipate & Plan	10	10	5	1
Duration	Governance Policy & Procedure Development/Recalibration Project Start to End	Months	Months	Weeks	As Required
Frequency	Governance Policy & Procedure Development/Recalibration	1 Time	1 /Yr.	2-4 / Yr.	As Required

Digital Asset Management Operations

		Initial Implementation Project	POST IMPLEMENTAION		
			Solution Expansion Projects	Solution Enhancement Projects	Solution Maintenance (Break Fix) Releases
Resources	Business Function Owner Participation	N/A	N/A	N/A	N/A
	Business Function Manager Participation	10	10	3	As Required
	Content Owner Participation (Policy & Procedure Development)	10	10	3	As Required
	End User Participation (Training Classes)	10	10	3	N/A
	Communications Lead Level of Effort			3	As Required
	End User Training Lead Level of Effort	10	10	3	N/A
	DAM Librarian Level of Effort	10	10	3	As Required
	Project Management Level of Effort	10	10	5	As Required
Planning	Ability to Anticipate & Plan	10	10	5	1
Duration	DAM Operations Activities Project Start to End	Months	Ongoing		
Frequency	DAM Operations Activities	1 Time	Ongoing		

Solution Management Plan

Up through this point of this paper we've compared the similarities and the differences between your initial implementation project and have discussed the challenges unique to the post implementation activities. **Bottom line, your job is not over once you've finished your initial implementation project!** Post implementation, you'll still have project-centric initiatives (when expanding and enhancing your current solution footprint and delivering the associated rollout training). However, in addition, you will also need to address the day-to-day operational activities (user support, solution support, solution administration, DAM Librarian operations, booster training and new user onboarding).

Over the life of your "live" (operational) system, **you will spend more time, money and effort** than you did during the initial system implementation project. An initial implementation project has a defined begin and end date with a relatively short duration of time (4 – 12 months depending on the scope). In contrast, post implementation is an ongoing operational program that will require resource and financial investments throughout the entire life of the solution. A Solution Management Plan is the playbook to ensure you'll keep your solution, users and digital assets in perfect alignment throughout your post implementation journey.

What is Solution Management?

Solution Management is the program management and delivery function accountable for all post implementation solution enhancement releases, expansion projects, ongoing change management, training and support activities.

What are the Solution Management Plan Objectives?

The purpose of the Solution Management Plan is to ensure your solution delivers value to the stakeholders and users throughout the entire life of the solution. This is accomplished by ensuring your solution, users and digital assets remain in perfect alignment and operate at optimal efficiency. A Solution Management Plan consists of a service delivery framework, compliance policies, standard operating procedures, and governance processes. A Solution Management Plan has three primary goals:

- Enhance, expand and support your "live" **solution** to ensure it remains aligned to your business

- Engage, empower and enable your **users** to ensure they remain aligned to your solution

- Manage and Protect your **digital assets** to ensure your marketing content remains aligned to your brand

A Solution Management Plan specifies the **roles, responsibilities, policies and procedures** for:

- Approving, implementing, documenting, communicating, rolling out changes made to the solution.
- Engaging, enabling and supporting your users
- Managing and protecting your digital assets

What are the Benefits of a Solution Management Plan?

Your Solution Management Plan serves as the foundation and framework for operating, optimizing and supporting your post implementation marketing technology program. It will ensure you maximize user advocacy & adoption and minimize the time and money required when implementing changes to maintain perfect alignment between your solution, users and digital assets.

- Increase user awareness, enablement, advocacy & adoption

- Minimize costs for 1.) **support** (for your solution, users and digital assets), 2.) **solution change management** (enhancements, expansion and break/fix) and 3.) **ongoing end user communications and training**

- Streamline the coordination, communication and collaboration between the different internal and external solution management teams:

    - User, Solution & Digital Asset Support
    - Change Control
    - Design, Build & Deployment
    - Training
    - Communications
    - Hosting
    - Software Platform Support

- Increase the quality of and return on the implemented changes to the solution

How Do I Develop a Solution Management Plan?

Below is a summary of the key activities associated with developing and implementing a Solution Management Plan:

- Identify the **roles & assigned people** responsible for:

    - Approving, implementing, documenting, communicating, rolling out changes made to the solution.
    - Engaging, enabling and supporting your users
    - Managing and protecting your digital assets

- Define the end-to-end **process, policies and standard operating procedures**
- Identify and define all the **deliverables**
- Develop a **communications and training program** for your internal Solution Management teams and external service providers
- Develop a **governance model** to ensure optimal execution of and adherence to the Solution Management Plan

Although the recommended activities above are not complex, they do require time and consequently too often get skipped. Why is that? Most often it is because of a lack of resources, constrained budgets, and stakeholders and users demanding changes to be made immediately. The temptation to "just do it" and "do it fast" can cause you to operate outside of a controlled process which impacts quality, user awareness and user enablement which in turn can cause additional problems (incidents and low user adoption).

Remember, your success will be measured on how quickly you demonstrate value to your stakeholders and how deeply your users embrace, leverage and promote their new solution. You can't accomplish that without infusing quality control and user communication and enablement procedures into your day-to-day solution management activities.

What's the best way to make sure you develop and stick to a Solution Management Plan? Don't wait until the solution change requests, incidents and new users arrive at your doorstep. Begin developing your Solution Management Plan at the beginning of your implementation project and treat this as a parallel workstream to your initial implementation project. Avoid the temptation to put the technology in the "driver's seat". Focus on solution advocacy and adoption. By doing this, you will deliver the promised value to your stakeholders and users.