The Goldilocks Principle: Getting Your Software Implementation Just Right

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If you are about to embark on a significant software implementation project within your organization or are already along that journey, then negotiating the many variables for project success will likely be forefront in your mind. How can your firm maximize the chances of reaching that elusive go-live successfully – within scope, time, and budget and to the desired quality – especially given the disruption caused by the global health pandemic?

Whether your implementation team is onsite or working remotely, there are many factors that contribute to a successful outcome. Success now is of increasing importance given the resulting benefits to your organization and ability to enhance its competitive advantage, which is of particular importance given the climate of uncertainty in today's economic environment.

What does this have to do with the story of Goldilocks? If you'll recall, Goldilocks wandered into the Bears' cabin, ate their food, sat in their chairs, and laid in their beds. Each time, Goldilocks preferred the option that was midway between two extremes. For example, she ate all of the porridge that was neither too hot nor too cold but had just the right temperature.

While there are many similarities among software implementation projects at professional services firms, for example, the same software, a similar technical infrastructure, common financial controls and functionality requirements, no two projects or firms are alike. Therefore, the approach to delivery and project management must be dynamic to provide just the right 'fit'.

Finding the right balance with project management

Consistency and continuity in regard to project delivery is an important factor. But, being overly prescriptive with your project methodology for the sake of consistency, particularly if it is overly administrative, cumbersome, or officious, can significantly stifle progress. If the methodology is not able to morph to suit the needs of the firm and the particular project delivery in question, then the project is likely to be protracted and less successful.

Rigid project methodology

I recently worked on a project for a large law firm that was implementing 3E. It had defined a methodology which was loosely based on a number of key, well-known methodologies and delivery frameworks. Although providing the appearance of control, the project was stifled by an overly rigid approach and in some areas actually prevented the project resources from efficient delivery.

A key issue that caused delays was the sheer frequency of meetings that the implementation team needed to attend on a weekly basis. The team also had to produce a tremendous amount of documentation prior to actual project work being allowed to continue. In this instance, following the methodology for its own sake had become a higher priority than the actual delivery. The result was a significant imbalance that needed to be readjusted.

Loose project control

In contrast, during a 3E implementation at a medium sized law firm we were called in to support, the project leads demonstrated just the opposite approach and exhibited little or no apparent control. There was an ineffective and inadequate plan, negligible risk or issue management and resource booking was inconsistent and, in most cases, only executed days before a task was due. This loose structure invariably led to missed deliverables and delayed milestones. The project required additional controls and stronger project management and governance to alleviate the situation.

Just the right amount of structure and agility

The most successful outcome by far are projects that provide enough control but also the flexibility to adapt to the needs of the changing environment, and specifically due to the outbreak of Covid-19. We worked on projects where each firm had been prudent in its approach to risk and issue management. We were able to mitigate the disruption caused by a remote work environment to ensure the successful continuance and completion of the project. These countermeasures included regular risk and issue assessment, contingency budgets, effective continuity planning, plus dynamic and collaborative project management.

Living happily ever after

These examples provide clear indication that a balance needs to be struck between project control and project delivery. The first two examples resulted in overspending, missed deadlines, and could ultimately have led to a missed go-live – or worse – project curtailment and failure. To avoid these issues and ensure a successful outcome, provide structure, but be flexible. And of course, remember that the moral of Goldilocks story is ultimately to consider how your actions might affect others. So in addition to adopting the right methodology, be sure to have the right team in place for the most successful outcome.

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