



Consolidated Implementation Planning

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All long term projects compete for time and space. The January 2008 "Tool of the Month" is designed to organize the planning of multiple implementations over time, especially when there is limited access to computer labs or war rooms. While Microsoft Project is the preferable tool for scheduling the detail tasks for the project, usually one schedule for each major module, this Excel spreadsheet provides quick visibility of key dates across all modules that typically compete for physical space and critical human resources.

On Tab one, after all the implementation weeks in play are identified, the holidays are inserted along with any black out dates. Once the vendor begins to provide schedules for training, consulting or installation services, these topics are placed on the tool for the appropriate week and the aligning project is marked with an "X". Space is made for the name of the consultant and for tracking the receipt and exchange of documentation.

The second tab labeled "Revision History" is used to document the changes that have been made since the previous version. A user of the Tool will only have to review this tab to understand the change that has taken place.

Tab three, "Vendor Contacts" is a single location for all the points of contacts related to the implementation(s). The primary software vendor is obvious but contacts may be numerous. The Account Manager, Project Manager, Consultants & Trainers all have different contact information. Don't forget the contacts for the various ancillary software vendors that are used throughout the life of the implementation.

The fourth tab is a calendar for easy access to days of the week and holidays. Black out dates and other key institution events can be places here during planning. Be sure to transition the holidays and black out periods to Tab one where all the training and consulting periods are identified.

[Click here to access the Consolidated Implementation Planning Template](#)