



TREADWELL

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PREPARING FOR SUCCESS: THE CRUCIAL ROLE OF CQI IN CLIENT DATA MANAGEMENT SYSTEM IMPLEMENTATIONS

Brittany Willard
December 13, 2024

Brittany@treadwelldata.com

Agenda

1. Introduction
2. Objectives
3. When and why to involve CQI Staff
4. Understanding the components of an implementation scope
5. Keys to a successful implementation
6. Questions



About Me

- 6 Years in Child Welfare Data in Delaware
 - Implemented a CRM system (Apricot)
 - Attended the Illinois CQI conference!
- 3+ Years in Implementations at Treadwell



WHY TALK ABOUT PREPPING FOR IMPLEMENTATIONS?

Objectives

1. Identify key **preparatory steps** necessary before beginning the implementation of a client data management system.
2. Understand the role of CQI staff in ensuring data accuracy and improving workflows during system implementation.
3. Be prepared to develop a **comprehensive implementation plan** that integrates CQI strategies to ensure ongoing system improvement and data quality.
4. Understand the **key components** of a data management system implementation to anticipate the process and learn what questions to ask so that you can understand all aspects that will be addressed during the implementation.

Important Assumptions

- The product has been selected
- Funding has been secured
- While the presentation is structured for a new system implementation, the content is largely applicable to new program implementations within an existing system, as well





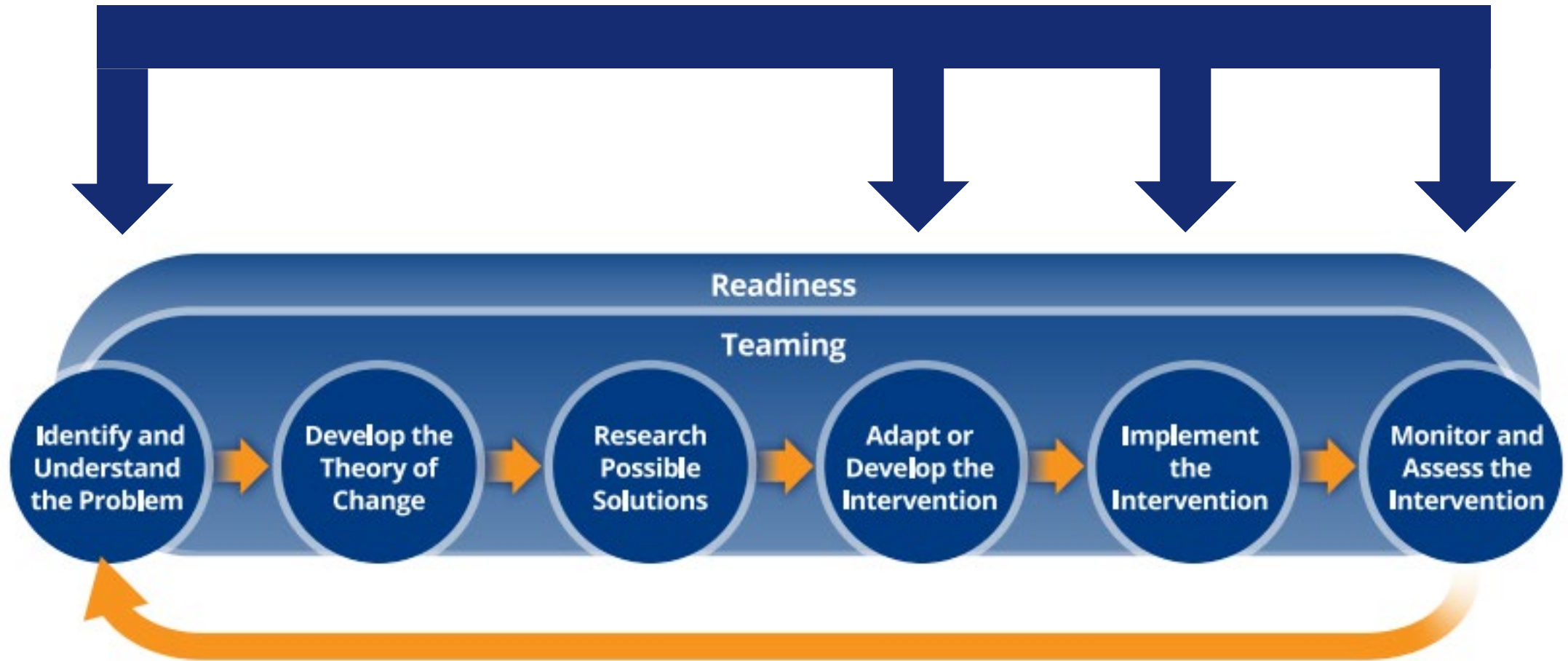
WHEN AND WHY INVOLVE CQI STAFF

When should CQI be brought in?

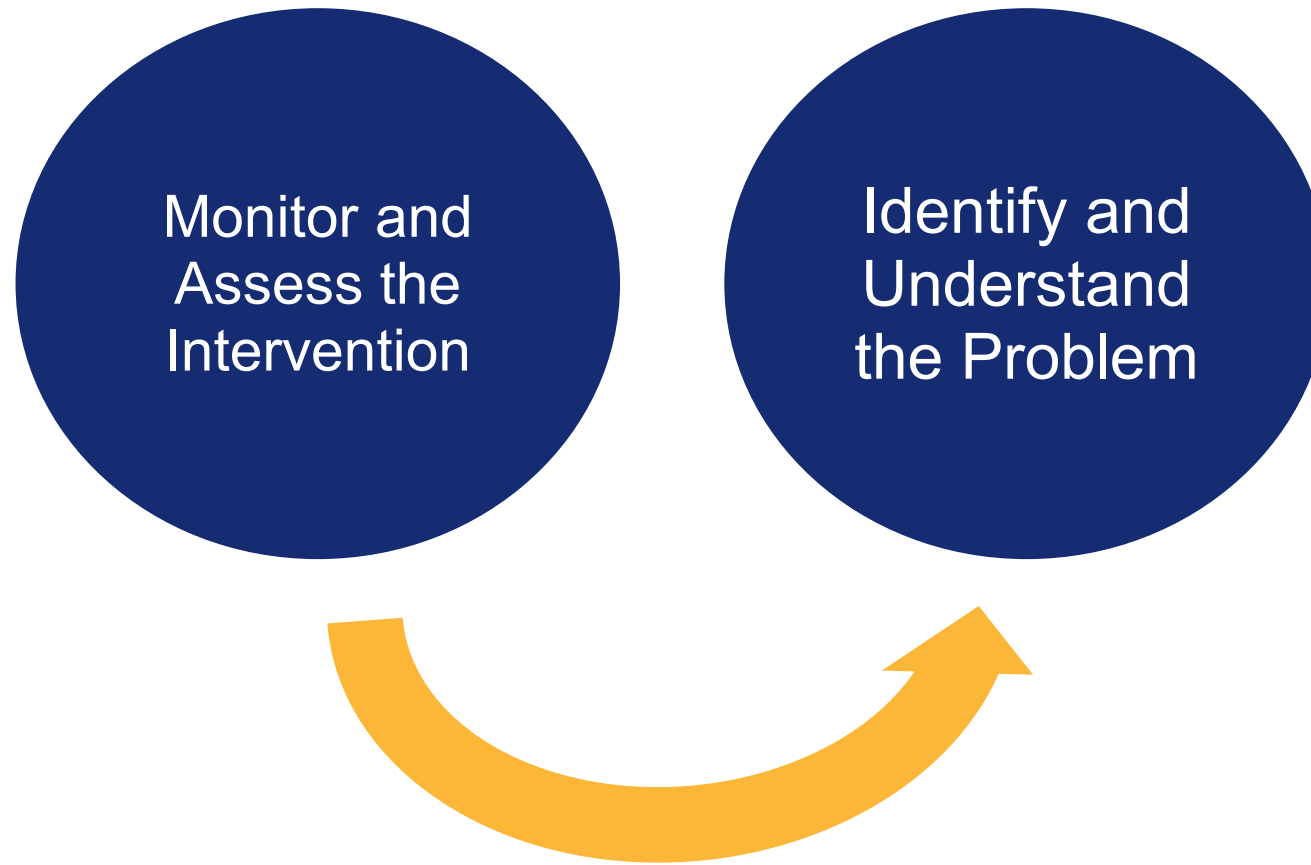
- It's never too soon!
- Your CQI folks will understand those intricate data needs (and can look past distracting bells and whistles)
- The sooner they are involved, the more time they have to prep



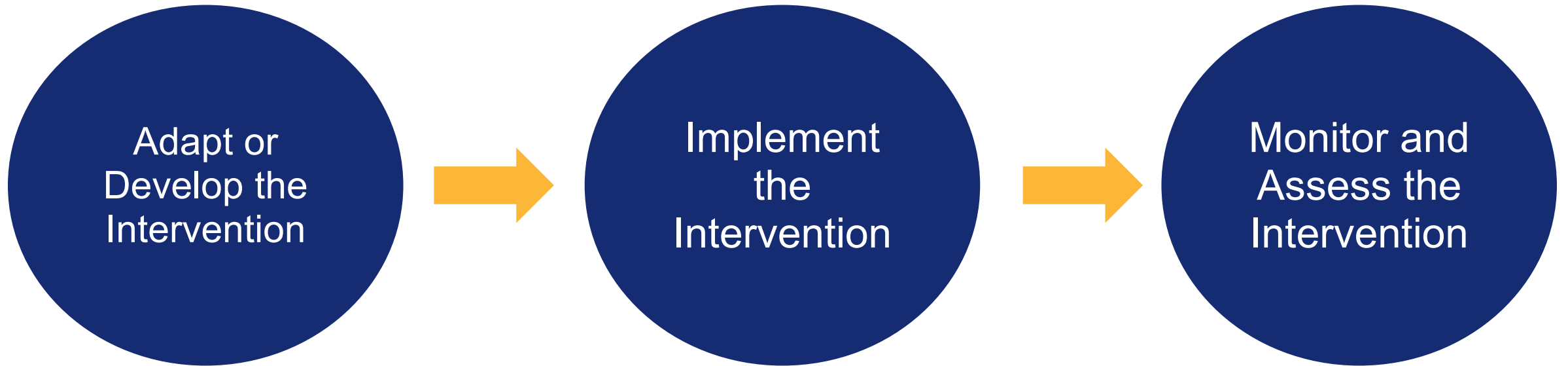
The CQI Process



CQI and CRM Implementations



CQI and CRM Implementations



UNDERSTANDING YOUR IMPLEMENTATION SCOPE



Understand the Process: Key Components of an Implementation



System Design and Configuration



Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

Understand the Process: Key Components of an Implementation



System Design and Configuration



Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What it is:
 - **System Design:** the build plan for your system based on discovery
 - **Discovery:** In-depth review of real-life processes and needed documentation. Front-line staff are generally best suited for these conversations.
 - **Configuration:** The specific building components of your system
 - Forms/documents/views/screens/tables
 - Reports
 - Quality Assurance Reports*
 - Other Features (ex. Portals, calendars, etc.)

Understand the Process: Key Components of an Implementation



System Design and Configuration



Data Migration and Validation



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Training



Go-Live and Post-Implementation Support

- What to Ask:
 - Who will do the work (your organization, the professional implementors or a combination)?
 - What is the time commitment expectations of your staff during configuration?
 - Will all programs be implemented?
 - What is the expected timeline? Is there any leeway in that timeline?

Understand the Process: Key Components of an Implementation



System Design and Configuration



Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What it is:
 - **Data Migration:** Moving Data from your old system to your new system
 - **Validation:** Confirmation of the accuracy of the data migrated

Understand the Process: Key Components of an Implementation



System Design and Configuration



Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What to Ask:
 - Who is responsible for pulling and cleaning your data from your old system?
 - How difficult is the data migration process?
 - Does the system have the functionality to allow you to do the migration without the help of a professional?

Understand the Process: Key Components of an Implementation



System Design and Configuration



Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- Consult CQI Staff:
 - What data is key to be moved?
 - What is important for reporting and monitoring?
 - How far back should your migrated data go?
 - What kind of trend data do you hope to pull from your new system?

Understand the Process: Key Components of an Implementation



System Design and Configuration



Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What it is:
 - **Testing:** Validation of the configuration of your system by internal staff
Note: It is helpful to use some real-life cases to help understand the workflow

Understand the Process: Key Components of an Implementation



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Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What to Ask:
 - What does the testing process look like?
 - How many rounds of testing can we complete?

Understand the Process: Key Components of an Implementation



System Design and Configuration



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Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What it is:
 - **Training:** Training your staff to use your new system. Training can be for both end-users and for administrators.

Understand the Process: Key Components of an Implementation



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Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What to Ask:
 - What kind of training is available?
 - Administrative users – how to use the back end to make changes, create new forms, manage users, create reports, etc.
 - End Users – walking users through the data entry process specific to them.
 - What is the style of training – group trainings or train-the-trainer model?
 - What deliverables will come from the training? (Ex. Recordings, manuals, etc.)

Understand the Process: Key Components of an Implementation



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Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What it is:
 - **Go-Live Support:** Support for your organization during the initial go-live time frame to help resolve any issues (usually around 1 week to 1 month)
 - **Post-Implementation Support:** Ongoing support for your organization to help with training, strategizing any changes to the system, reporting support, etc.

Understand the Process: Key Components of an Implementation



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Data Migration and Validation



Testing and Feedback



Training



Go-Live and Post-Implementation Support

- What to ask:
 - How many hours do we have support?
 - How many weeks do we have support?
 - What does support mean – is it guidance for how to resolve issues or actual issue resolution?
 - Post implementation: do the hours reset? Are they “use it or lose it”? Do they recur over time?



KEYS TO A SUCCESSFUL IMPLEMENTATION

Keys to a Successful Implementation

- ✓ Set realistic timelines and goals
 - Implementations take time!
 - Implementations can be iterative.



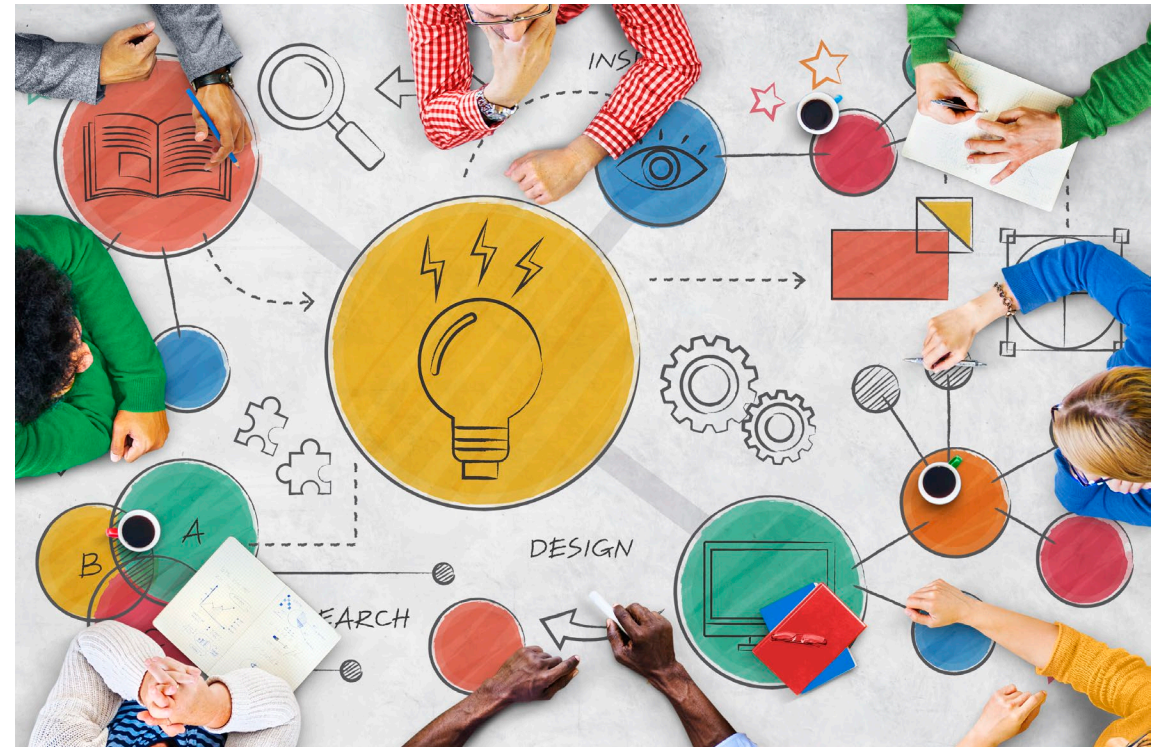
Keys to a Successful Implementation

✓ Preparation: Compile and Outline all Processes

- Know your full process and needs
 - Identify all of your processes – both those happening within and outside of your current system – from referral into your program through exit (including any alumni or post-exit activities)
 - Identify what processes might be missing from your system
- Gather all of your documentation: forms/tables/spreadsheets/screens/etc., reports, process maps, etc.

Keys to a Successful Implementation

- ✓ Preparation: Plan for Desired Changes
 - Identify pain points or areas where staff struggle
 - Make a wish list for your new system



Keys to a Successful Implementation

✓ Time and Dedicated Staff

- These are the most important components of software implementations!
- Determine appropriate staff (usually at least 2 staff people)

Who	What	When
Internal Project Manager	Main Point of Contact; Aware of all stages of the implementation	Duration of the Implementation
CQI/Data Staff	Validation of all data needs	Duration of the Implementation
Program Expert (ex. Front-line worker or manager)	Primary source of knowledge for processes	Discovery, Testing

Keys to a Successful Implementation

- ✓ Staff buy in
 - Ideally, this starts as early as possible
 - Staff survey
 - Involve staff strategically
 - Identify your super-users

Keys to a Successful Implementation

✓ Make a Training Plan

- Decide the method of training
 - End User
 - Train-the-trainer
- Documentation (videos, manuals, etc.)
- Continuous Training Plan
 - Provide refreshers for staff
 - New feature/functionality trainings
 - New hire training



PLAN IT OUT



Step	Who is Responsible	For What	When
Documentation Gathering	Team ABC	Find all forms, reports, requirements, desired changes, etc.	October-November
Discovery	Team ABC & XYZ	Relay information and requirements to vendor for configuration	December
Configuration (form/report building)	Vendor Staff A Staff B	Main forms and reports Specialized forms Specialized reports	January February March
Migration	Staff C Vendor	Pulling data from old system Only data from FY20 to current; only client names and case notes	April
Testing (both the system configuration and the migrated data)	Team XYZ Team ABC	System configuration Data Migration	March April
Training	Vendor	Full end-user training	May
Ongoing Support (both maintenance and training)	Staff A Staff B	Minor system changes New staff training	Ongoing

Planning for Success After Implementation

Key Areas to Address Post-Implementation:

- ❑ Training and Support
- ❑ System Optimization
- ❑ Plan for Change Management
- ❑ Metrics for Success

CQI Role in Post-Implementation Success:

- ❑ Data-Driven Insights
- ❑ Monitoring Data Quality
- ❑ Continuous Improvement Plans

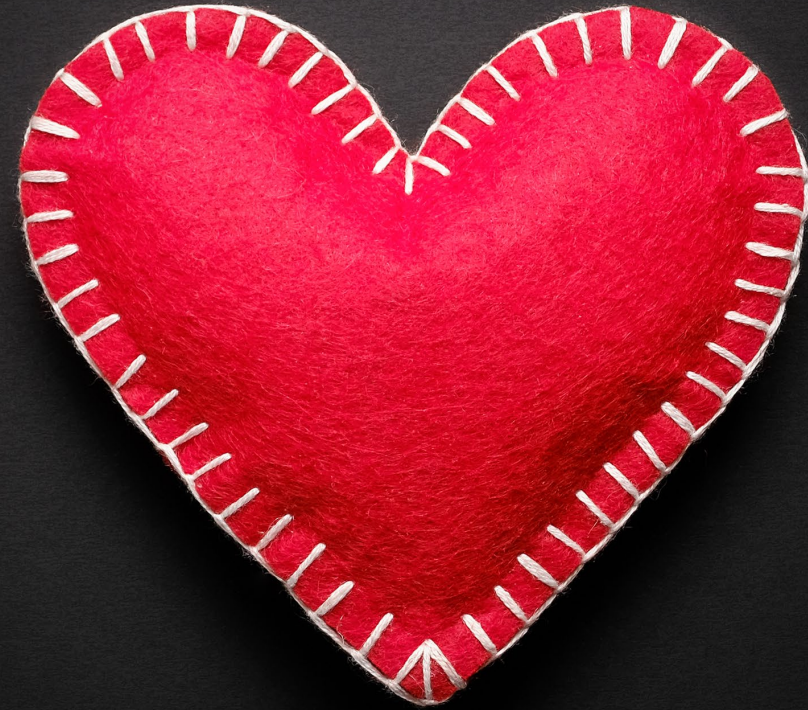
Things to Remember 🤗

- Key preparatory steps for an implementation include: Compile and outline all processes, Plan out desired program changes, determine appropriate staff for involvement
- If the CQI staff haven't already been brought in during the product selection, the best time to bring them in is during the planning process – or as soon as possible.
- Front line staff will be instrumental throughout the Discovery and Testing phases on your implementation.
- Quality assurance reports are key to ensuring data integrity and should be considered during the configuration of your new system.
- CQI staff will be able to consult about historic data needs in your new system during the data migration and validation stage of the implementation

**LOOKING FOR
SUPPORT?
CONTACT ME!**

Brittany@treadwelldata.com

www.linkedin.com/in/brittanywillard



QUESTIONS?

