

# LiquidPlanner Implementation Guide

## 5 Keys to a Successful Rollout

Managing the changes required to get everyone up and running in a new online project management system can be a challenge. If you want your team members to make regular updates and fully adopt the new tool, you'll need a plan for bringing everyone on board. Your specific timing, methods, and strategies will be unique to your team, but here are five key factors that shouldn't be overlooked.

<p><b>1: Identify a LP “Guru.”</b></p> <p>Identify one key point of contact within your group. (Hint: if you're reading this, it's probably you!)</p>	<ul style="list-style-type: none"> <li>• Figure out who will be the “go-to” expert on LiquidPlanner. They should be willing to help other team members with questions about the tool.</li> <li>• Make sure the LP Guru has attended a <a href="#">LiquidPlanner Basics training session</a> or watched the <a href="#">training video series</a> and is familiar with other support resources.</li> </ul>
<p><b>2: Develop a Sound Plan Structure.</b></p> <p>Before a broad rollout, architect your LP workspace to reflect the way your team works.</p>	<ul style="list-style-type: none"> <li>• Clearly define your project deliverables, who your clients/stakeholders are and how you will use <a href="#">Packages</a> within your plan structure.</li> <li>• Schedule a “Workspace Review” with your support manager to make sure your plan structure is optimized to meet your planning needs.</li> </ul>
<p><b>3: Define User Groups.</b></p> <p>Not every team member will need to perform the same functions in your project workspace.</p>	<ul style="list-style-type: none"> <li>• Define who has permission to perform different actions in the tool up front. You may want to consider breaking your team into separate user groups. For example:             <ul style="list-style-type: none"> <li>- <b>Management:</b> This user group prioritizes work in the greater plan and has access to confidential timesheet information. This will likely include the LP Guru and other key decision-makers on the team.</li> <li>- <b>Project Managers:</b> This group creates new project structure and makes task assignments.</li> <li>- <b>Individual Contributors:</b> This group logs progress and makes task updates on work assigned to them.</li> </ul> </li> <li>• Decide if you'll need formal business rules to support these user roles.</li> </ul>
<p><b>4: Craft Your Implementation Plan</b></p> <p>The way you roll LP out to your team sets the stage for adoption.</p>	<ul style="list-style-type: none"> <li>• Present the initiative to use LP to your team through a <b>kick-off meeting</b> or an introductory email. Consider the tone of the message. Decide upfront if using LiquidPlanner will be mandatory or optional.</li> <li>• Determine if you will take a <b>phased roll-out approach</b> or if you will get everyone on board at once. In a phased approach, choose a small group to be part of the first implementation group. This group is usually comprised of project managers and early adopters who will help see where the plan structure and process can be optimized. Note potential points of confusion for the subsequent implementation groups and be sure to address them proactively.</li> </ul>

<b><i>Craft Your Implementation Plan (cont.)</i></b>	<ul style="list-style-type: none"><li>• Determine if you will <b>train your team members</b> or if you will have your LP support manager train your team.</li><li>• Consider creating a “<b>cheat sheet</b>” list of instructions on how to perform basic actions in the tool.</li></ul>
<b>5: Set Expectations for Daily Life</b>  The daily experience and time commitment of using LP will be different for each user group.	<ul style="list-style-type: none"><li>• <b>Communicate expectations</b> for how your team will use LP on a day-to-day basis. Reinforce these expectations in team meetings, email communication, and one-on-one conversations.</li><li>• Encourage Individual Contributors to read <a href="#">Daily Project Life for Team Members</a>.</li><li>• Encourage Project Managers and above to read <a href="#">Daily Project Life for Project Managers</a>.</li></ul>

Need help with your implementation plan? Contact LiquidPlanner support at [support@liquidplanner.com](mailto:support@liquidplanner.com).