Tips for Installing a New Traffic System
Part Four: Your checklist for success

We hope you've enjoyed our four-part series on Installing a New Traffic System published by the Traffic Director's Guild of America. In the final part we discussed ways to keep those important details on-track and have posted this checklist as a follow up to the published article. It includes items that you need to take care of at your end, plus items that you should expect your vendor to cover.

We hope you'll find this list helpful when it comes time for installing a new traffic system, either as a complete checklist or as a starting point for your own.

Sincerely,

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3 months prior to Go-Live

Client:

- ☐ Assign a Project Manager. This person will be responsible for the management of the implementation project as well as the main contact for the vendor.
- ☐ Fill out the Site Survey provided by your vendor. Give as much detail as possible as this will be used to help understand your business processes and how your stations run.
- ☐ As part of the site survey, review current processes. Are there changes that you'd like to make? Moving to new software is a good time to make these changes, as you'll have a trainer available to you to help with the transition.
- ☐ Define what departments will be affected by the training.
- ☐ Introduce those departments to the software to get buy-in from the various stakeholders.
- ☐ Advise those departments of the upcoming changes and black-out the training time to any vacations.
- ☐ It's likely that some overtime will be required while the launch takes place so make sure that users are aware of this and can plan for it.

Vendor:

- ☐ Work with client to ensure that deliverables for go-live are understood and can be met
- ☐ Begin working with the client to create the training schedule.
- ☐ Establish regular meetings to ensure the project stays on track and questions and concerns are being addressed.
- ☐ Review the returned site survey and meet with the client to answer questions.

2 months prior to Go-Live

Client:

- ☐ Book the Training room(s).
- ☐ If a Staff Audit has been sent, make sure it's filled in and sent back to the vendor. Typically the Staff Audit will include the users who will be using the software, indicate the department they work in and their comfort level with change and technology in general. This is key in allowing the trainer to know in advance who might need some additional attention.

Vendor:

- ☐ Continue with regular meetings. If required, start meeting either weekly or bi-weekly as the project gains momentum.
- ☐ Send a draft copy of the training schedule to allow people to plan around the training sessions and give them ample time to make any changes.
- ☐ Book flights, hotel , etc

1 Month Prior to Go-Live

Client:

- ☐ Book any additional training resources, such as a projector or additional computers.
- ☐ Ensure that the end users are aware of upcoming training and its importance to the overall success of the project.
- ☐ If the vendor has provided training schedules and training materials, these should be distributed to the users
- ☐ Work with the vendor to ensure that all deliverables for Go-Live are on schedule.

Vendor:

☐ Send the final training schedule and course materials

☐ Review with the client that everything is ready for the on-site visit

☐ Make sure that the database is up and running and ready to go

While On-Site:

Client:

☐ A few days before the trainer arrives, make sure the training room is set up according to the agreed-upon specifics.

☐ Any concerns with training, such as training style or content should be addressed as soon as possible with the vendor so the problems can be resolved quickly.

☐ Work with the trainer to juggle any changes in schedules

☐ Ensure that people come to training on time and stay for the entire scheduled session. Making other users and trainer wait for late attendees, or leaving early, is a poor use of the limited (and expensive) time you have with the trainer.

Vendor:

☐ Establish a daily meeting to discuss any issues that arose during the training session.

☐ Support changes to workflow and suggest areas of improvement.

☐ Manage any changes to the scope of the implementation project.

After the Trainer leaves:

Client:

☐ Continue meeting regularly with the vendor for any follow up issues.

☐ Make use of the vendor's support department and call before you're frustrated. They are there to help you and expect increased calls from new users.

Vendor:

☐ Schedule a daily meeting with the client to address any procedural or training questions

☐ Transition the client to the support department.

☐ Once back in the office, send an assessment report of the training that includes any follow up or recommendations to the client.