

Best practices for a successful adoption

Studies in the private sector show that 7 out of 10 change efforts that are critical to organisational success, fail to achieve their intended results. The adoption of the Sigmah software is no stranger to that risk. This document puts together some of the best practices for successfully managing change whilst incorporating lessons learned and advices from organisations having already adopted Sigmah.

Project strategy

Support from the management team is a prerequisite for success. Therefore, it is important for the organisation to understand both the benefits of the software and the consequences a status quo would have. If the project fits in the strategy of the organization, it must also turn into concrete actions like allocating the necessary resources to reach the objective (project team, training, infrastructure...).

“The adoption of Sigmah at Handicap International is not a geek story; it is the story of a decision being taken at the head of the NGO. It is not just a few individuals who suddenly decide to put it in place; it is truly an organisational decision. It is not technical; it impacts the whole organisation and the resources that will be allocated to the project. It is a strategic decision supported by the direction”

Sandrine Chopin, Handicap International, June 14th 2011

Project initiation

Organisations adopting Sigmah usually designate Project Sponsors and form a Steering Committee to follow the implementation of the software. One person (even only part-time) should be in charge of global coordination and follow-up at head office level. Experience shows it also helps to have relays at field-level or programme-level for larger organisations.

The project should be led by representatives of the services most impacted by the adoption of Sigmah (usually Operations and/or Monitoring and Evaluation). Other services (for example Finance) are strongly encouraged to participate but the focus should remain on answering the needs of the prime users of the software.

Project communication

Any change in an organisation will most likely generate resistance even if there is a common understanding of problems encountered in the past and an agreement change needs to happen. Internal communication is therefore highly important from the early stages of the project and also for staff not directly involved in the adoption of the software. Project Objectives should therefore be clearly stated and communicated along with expected advantages and improvements. Foreseen difficulties should be addressed too with possible solutions to overcome them. Communications around the project should be done on a regular basis (starting by introducing the project team, individual roles and responsibilities). Time, practice and proven positive results will contribute to a successful adoption of the software.

Project objectives

1- Qualitative and quantitative objectives:

Defining the objectives of the project and communicating around those is a key step of a successful adoption. A project document can be used to state the objectives, the expected results, the allocated resources, the planning and the roles and responsibilities in the project.

“The objective for Handicap International was to be able to improve project follow-up, to have a better coordination of contracts management, to improve Project Managers capacity and to free up some time for the staff.”

Mathilde Guilment, Handicap International, July 2013

2- Functional and geographical scope

Sigmah is designed for Project Cycle Management. By defining the functional scope of your adoption, your organisation will define what specific tasks will now be done in Sigmah. Most organisations having adopted Sigmah have moved from using Excel, Access or Word files to start following projects in Sigmah. Possible duplications with other tools used in your NGO should be avoided as much as possible (if for example, a project manager has to type in financial information both in Sigmah and in the financial software, it is likely one of the 2 systems won't be updated). It is at this important stage that your organisation will have to clearly define what information is stored where (preferably in system only) and who manages it.

It is up to your organisation to decide the geographical scope of the adoption. Medium-sized to large organisations usually choose to have a pilot phase for the software adoption on a limited geographical scope. Smaller NGO have done a global roll-out. Below are some advices from Sigmah partner organisations:

- It is not recommended to adopt Sigmah for only one project (even if that project is a large one with multiple partners) on a desk managing multiple projects. In that scenario, 2 information systems (Sigmah and the previous one) will co-exist and it risks creating frustration amongst the users and hampering the full adoption of the new software.
- Depending on the NGO resources and strategy, it is recommended to avoid testing with one single Desk. Sigmah will then be associated with that Desk and the Desk Officer instead of being seen as global organisational project.
- It is recommended to choose a pilot country or region where the team is looking forward the adoption of the software and where key team members are proactive and comfortable with new technologies and software. It is also recommended to consider the quality of infrastructure in that region (internet connection, local IT infrastructure...).

Project implementation

While the software is being implemented, existing processes and roles will be questioned (the traditional way of doing things). Innovative solutions or simplification will hopefully ensue! Some organisations have highlighted how the Sigmah project has helped them clarify roles and

responsibilities (at Desk and at field-level) when designing the configuration; and has strongly helped project managers to better understand and follow the Project Cycle Management.

One of the stumbling blocks organisations have faced is the amount of information Sigmah should prompt users to enter. Most organisations started by requesting too detailed information and have all simplified their Sigmah project models since. It is therefore recommended to keep the configuration simple at first and limit the information captured to the essential. It is also recommended in the initial stages to focus on the prime users (Operations, Monitoring and Evaluations...) and limit the information other services are prompted to enter in Sigmah. With a simpler configuration focusing on the prime users, the software will be launched faster. Additional users can be brought in later and additional information can be added to the project models (via the Administration and its simple Graphical User Interface).

Another critical point is the definition of access rights. One of the advantages of Sigmah is to gather all project information in one central application. Some of that information might be confidential (and will need to be made only accessible to a few users) but access rights should not prevent exchanges of information. One of the added value of the software is that it allows users from one country to access project information from another country (or region) and learn from experiences.

Project team participation

A lot of effort should be placed on people for a successful adoption. Organisations having adopted Sigmah recommend involving future users (at head office and in the field) since the initial stages of the project. IT support should also be integrated throughout the project for helpdesk, troubleshooting, minor adjustments/adaptation...). Once the software is ready to be launched, the initial data entry in Sigmah can be quite demanding depending on the size of your organisation. Some organisations have therefore dedicated resources to support project managers in the field with their initial data entry. Finally, training modules and support documentation must be developed and training sessions for users planned.

Project sustainability

After the software is launched, it is recommended to follow-up with users, collect their comments and make sure they keep using the tool. Refresher training can be offered regularly along with initiation sessions for new users. Some organisations have also designated Sigmah focal points to give advice, train new users and respond to first-level troubleshooting issues. Focal points can also liaise with the person in charge of the software at head office and with the IT support for technical issues. Regular communications on the software (for example: testimony from users, new features...) will also help to keep users interested!

For additional information, please contact our team at: contact@sigmah.org