Softly, Softly, Catchee Monkey...

Successful Development and Implementation

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Are you ready for *[Insert Generic Open Source Software Name Here]*?
Is *[Insert Generic Open Source Software Name Here]* ready for you?

- Test server… with a ***stable*** release
- Gap analysis
  - Software dependent? Or workflow dependent?
- Are gaps major or minor?
  - Major Gaps = large development projects
  - Minor Gaps = be creative

Resources?

Have you got developers in-house?

- What do we *really* need?
  - Requirements
    - Use cases – no edge cases
    - Workflows
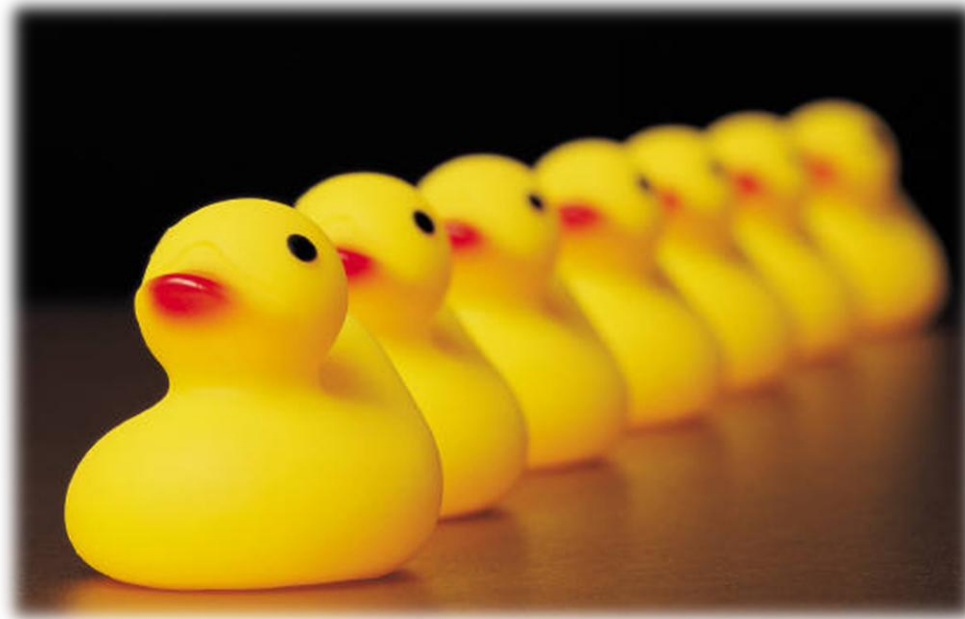   - Focus on outcomes, not processes
    - Be specific

We have a SOW… now what?

Finding your development partner(s)

- Engage the community via irc, mailing lists, or conferences
  - Evergreen Conference is in Vancouver in 2013!
- Look locally (other OS projects, students, GSoC participants, etc.)
- Write an RFI or RFP
- Request a quote from a vendor
- Hire a consultant
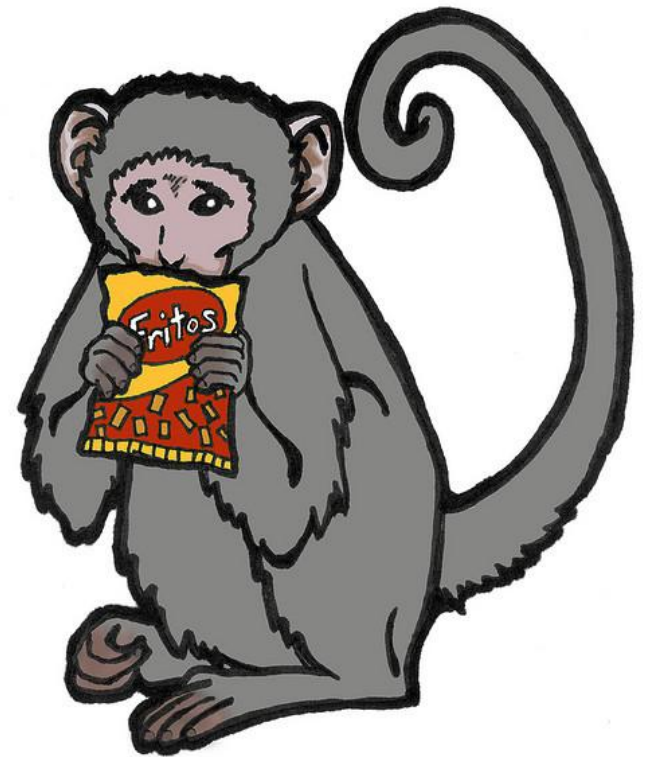
The Contract...

- Specificity in:
  - Hours estimates
  - Costs
  - Ownership of work
  - Documentation
- Interaction with community
- Deliverables
- Milestones
- Testing/Sign Off

Client Perspective

- Challenges:
  - Communication
  - Scope creep
  - Be realistic about time for testing, clarifications and feedback
- Best Practices:
  - Update your project plan
  - Build a team of Subject Matter Experts
  - Provide real examples, use cases and mockups whenever possible
- It's never too soon to start thinking about your go live timeline and identify dependencies

Vendor Perspective

- Challenges
  - Multiple clients/projects competing for time
  - Communication
  - Use cases
- Best Practices
  - 1-to-1 Project managers
  - Clear, shared objectives (client/vendor/community)
  - Set priorities

`<b>code monkey like fritos</b>`
`<a href="http://jonathancoulton.com/">`

Test (and make peace in your heart with the fact that test will never equal production)

- Create a Test Manual… and use it

- Engage staff and patrons in creative solutions

- You will need a test server for testing and training. Period.

- Have an exit strategy

Edge cases will appear – stay focused on your priority list

Training

- Managers aren't necessarily trainers
- Set aside mandatory time
- Structured feedback is critical
- Have a plan for on-going training

Implementation

- Implement in phases
- Have a fall back position
  - Rollback to previous version, hot spare, offline mode, handwritten checkouts, smoke signals
- Change is hard - celebrate

Don't...

- Freak out

Do...

- Have fun, this thing you're doing is really cool!

- Have a life outside this project

Go walk your dog.