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
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.