

Starting
shortly

Please
wait!

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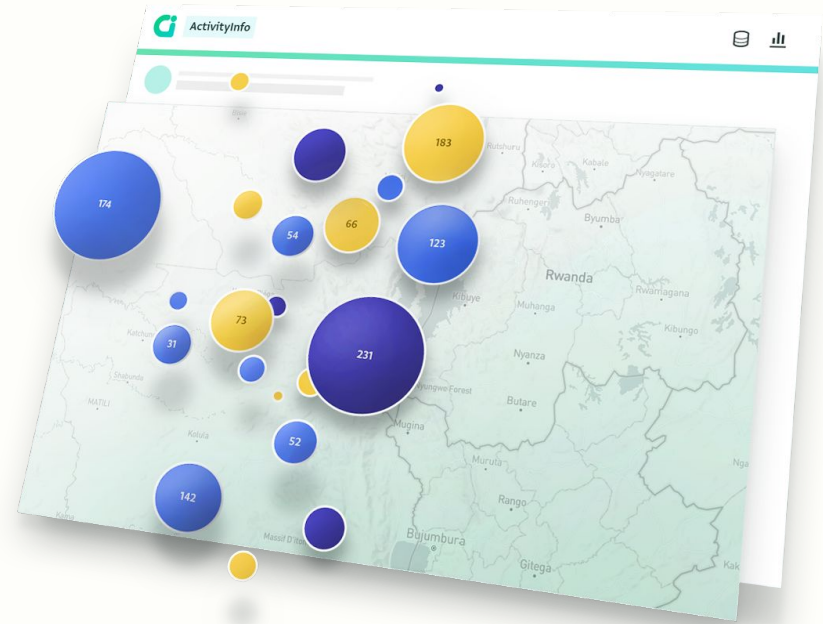
Best practices for rolling out new
Information Management systems

INTRODUCTIONS

Presented by the ActivityInfo Team

Monitoring & Evaluation Software

- Track activities, outcomes
- Beneficiary management
- Surveys
- Work offline / online



POLL

POLL

1. How would you describe your role?
 - a. M&E or IM officer in a central MEAL department supporting the whole organization
 - b. Program Officer or Program Manager responsible for program implementation
 - c. IT staff responsible for implementing IT solutions
 - d. Senior leadership providing governance and oversight
 - e. Other (type in the chat)

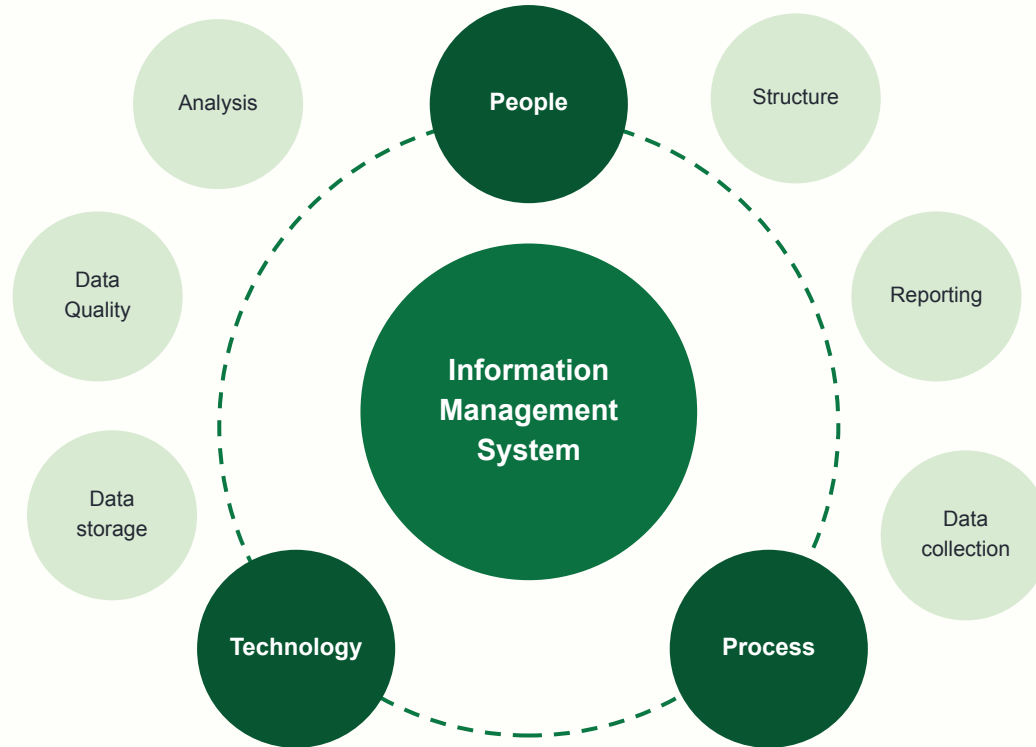
2. At what stage are you in your roll out of a new Information Management System?
 - a. I haven't started yet
 - b. I'm planning out what the system will look like
 - c. I'm currently building the system
 - d. I'm in the process of launching the system
 - e. I have just recently launched the system

Agenda

1. Understanding information management systems
2. Change management
3. How to roll out a new information management system
4. Common pitfalls and mitigation strategies
5. Q&A

Understanding information management systems

What is an Information Management System?



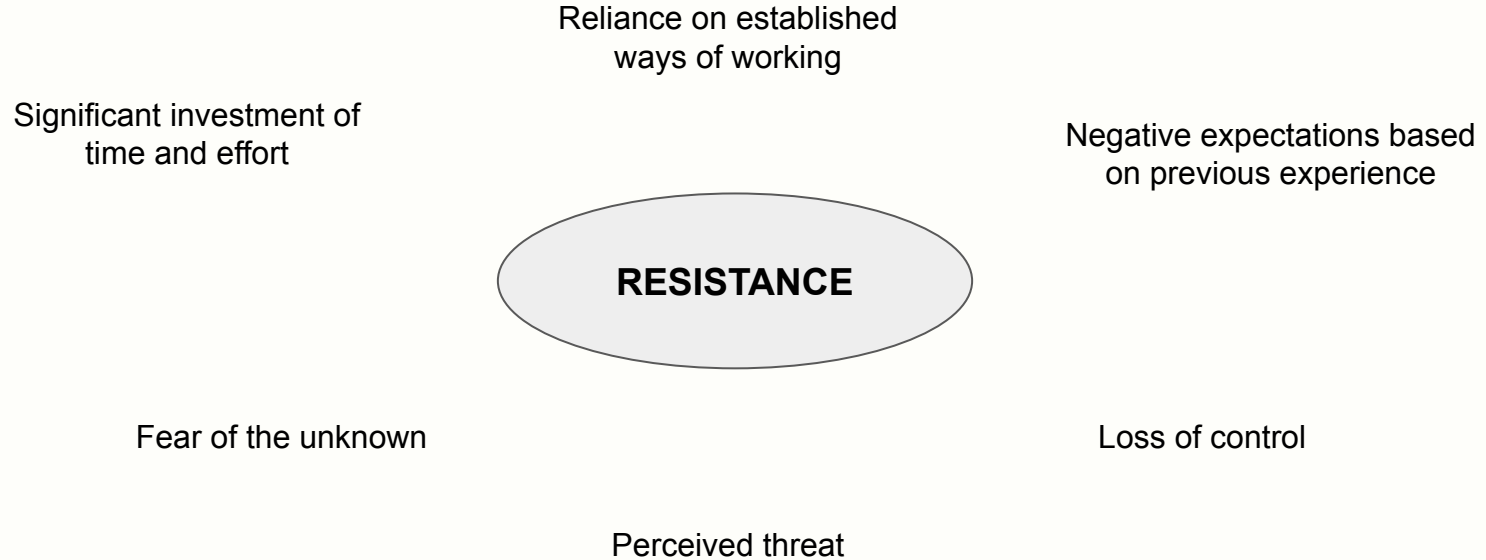
Change management

Why is change management so important?

The Information Management System represents a significant part of your organization's operations.

Expect **resistance** to change.

Why is change management so important?



Why is change management so important?



Change Management Best Practices

Know your stakeholders

Identify champions and recruit allies

Communicate often and maintain open lines of communication

Celebrate wins and build momentum

TRUST

How to roll out a new information management system

Before you even begin

Define your
WHY

Before you even begin

Example:

*“ABC organization is rolling out a new IM System to reduce the time it takes for our staff to complete their reports so that we can **make decisions more quickly.**”*

Stages in rolling out a new IM System



Stage 1: Assessment

Key tasks:

- Consult stakeholders
- Measure your baseline
- Review existing documentation
- Determine your readiness for change

Output

- ★ A thorough understanding of the current situation and clear expectations of what the new system will look like

Stage 2: Design

Key tasks:

- ❑ Process: Develop procedures, documentation
- ❑ People: Develop structures, roles and responsibilities
- ❑ Technology: procurement, configuration
- ❑ Alignment and testing

Output

- ★ A functional system ready for launch

Resources

- 📄 Guide for choosing a software solution

Stage 3: Launch



Key tasks:

- Internal launch event
- Training and onboarding sessions
- Dissemination of resources

Output

- ★ Staff are empowered to use the new system

Resources

-  Tips for effective capacity development
-  Best practices for developing internal training materials

Stage 4: Adoption

Key tasks:

- Monitor usage
- Collect feedback
- Troubleshoot issues
- Make necessary adjustments

Output

- ★ Sustained usage of the system according to expectations

Common pitfalls and how to overcome them

Not having
leadership buy-in

Identify a senior sponsor

Going it alone

Assemble a working group

Aiming for perfection

Create a safe space, pilot
and iterate quickly

Keeping your
colleagues in the dark

Create a communication
plan

Making it difficult to reach
out for help

Establish support channels

Q&A

Book a 30-minute consultation

<https://savvycal.com/jeric/chat>

