ActivityInfo

Best practices for rolling out new Information Management systems

Starting shortly

Please wait!
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?

- People
- Structure
- Data Quality
- Data storage
- Reporting
- Data collection
- Technology
- Process

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?

- Significant investment of time and effort
- Dependence on established ways of working
- Negative expectations based on previous experience
- Fear of the unknown
- Loss of control
- Perceived threat

RESISTANCE
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
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

1. **ASSSESSMENT**
2. **DESIGN**
3. **LAUNCH**
4. **ADOPTION**
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

<table>
<thead>
<tr>
<th>Common Pitfall</th>
<th>对策</th>
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<tbody>
<tr>
<td>Not having leadership buy-in</td>
<td>Identify a senior sponsor</td>
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<tr>
<td>Going it alone</td>
<td>Assemble a working group</td>
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<tr>
<td>Aiming for perfection</td>
<td>Create a safe space, pilot and iterate quickly</td>
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<tr>
<td>Keeping your colleagues in the dark</td>
<td>Create a communication plan</td>
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<tr>
<td>Making it difficult to reach out for help</td>
<td>Establish support channels</td>
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Book a 30-minute consultation

https://savvycal.com/jeric/chat