

A **TeamCatapult** White Paper



Five Things to Consider Before Purchasing a New Tool

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July 1, 2008

Software tools can really help a company. They provide a central location for information; they allow for consistency in data; they can automate processes and help improve efficiencies. All tools have this potential. However...

We have seen it time and time again. "We're not delivering our software fast enough." "We need to streamline our internal processes." "We need to be tracking X, Y, or Z." "We want to use such-and-such process." Somehow these declarations are frequently followed with the statement, "What tool should we buy?" If this weren't bad enough, the search for a tool is like letting a kid loose in a candy store. Many potential tool buyers are so swayed by the bells and whistles that they lose sight of what the tool can do for them, how well it meets their real needs, and what their true needs were in the first place!

As we have said, tools are good things; however, they are not a silver bullet. There are several things that you should consider before purchasing a tool.

1. Know what problem you are trying to solve

Okay, so why are you buying a tool? If you can't answer this question or you answer, "well, we need one," then STOP. You are not ready for a tool.

Go back to the moment you decided to purchase the tool. Why did you make this decision? If there are a whole host of reasons, pick the top three and focus on those. If these reasons are not documented, take a moment and write them down. Go ahead and do it now. We will wait. Matching the company's real priorities with what the tool can do and do well is paramount before purchasing.

Once you have identified the problem, think about the impact the tool is going to have on your team, organization, or group. We have seen several companies go out and buy a new timekeeping tool to pass government audits. Interestingly enough, they never thought about how they would have to set up and divide the work into projects so that they could distinguish government work from other

work. As a result, their folks did not know how to find, classify, and document their work based on the new tool and the new tool work classifications. It took months to clear that one up.

Solving your identified problem may require far more than a tool. Normally there are also changes to processes and procedures that go along with this purchasing a product. How will this new purchase fit within the existing processes and procedures? Will the new tool fit within the current way your organization, team, or group functions or will you have to change the way you work? Look at the boundaries of what the tool will do and will not do. Decide how this fits with your environment before you buy.

Here is an example of a tool not fitting with a company's existing environment. One manager didn't understand why their newly purchased agile project management tool didn't have a workflow. He wanted to use a workflow to assign a backlog item to a developer. When the developer set certain attributes the manager wanted the backlog item automatically assigned to the tester and then ultimately assigned to the product owner for acceptance. The problem with this approach is that this workflow assumes these people are not talking and participating in a typical agile team – where everyone sits together (or near each other at least) and where "individuals and *interactions* are more important than processes and tools." Without realizing it, the client expected the agile tool to resolve team communication issues: they wanted the tool to do their communicating for them. What they really needed to do was fix their agile process, and not blame the tool for working as designed. However, if they did not intend to change their process then they should not have purchased this type of tool. Again, think about the corresponding process and procedures before you buy.

2. Know what to communicate and when

Let everyone know that you are buying a tool BEFORE you buy the tool. Once you make this announcement, there will be

concerns. These concerns must be addressed. Change is hard and your team, organization, or group must be given the opportunity to become more comfortable with the change.

In this same initial communication, you should communicate the goal of the tool, i.e. the problem that you are trying to solve. If you are buying a tool to increase efficiency, that's great. This is what you need to communicate.

First, be specific in this initial communication. If your problem is that the company is not efficient, then be clear why you need to increase efficiency.

- Does increasing efficiency fit with your corporate goals?
- Is your competition blowing you out of the water?
- Are your employees getting frustrated with how long things take?

Second, indicate how you will know when you've solved the problem and the tool has achieved the intended goal.

- Will you survey employees to see if their frustration level has decreased?
- Do you want to decrease the time it takes to submit each employee's time by a certain percentage?

Third, keep your communication simple. People tend not to read long e-mails. Heck, people tend not to read anything long. Therefore, don't clutter your communication with extraneous information. If the tool will also keep all of your data in one place, this is cool too. However, if this is not a motivating factor in the tool purchase, keep it out of your initial communication.

Fourth, there should be follow-on communication after you have purchased the tool. Details, details, details and more details are needed. Your team will want the following questions answered:

- When will training be provided?
- What are the resources regarding the tool?

- What are the expectations regarding this new tool?
- Do I have to use it? Really?
- Which is more important, learning the tool, or my daily work?
- When are we expected to be using the tool completely?
- Seriously, how are you going to know if I am using it or not?
- What happens if I don't?

Most people are more willing to adopt something they know more about.

Finally, use several different methods for each follow-up communication. I know you think that your employees read every single word in every single e-mail that you send them but you might want to try mixing it up: talk to people, mention the pending tool purchase in meetings and at the water cooler, hang a poster where people hang out to eat lunch, get creative.

3. **Know how to use your tool**

This sounds silly, doesn't it? You would be surprised how many companies purchase a tool and then just expect the users to figure it out. Some tools are simple enough that this is an okay strategy but the users' still need to be given time to figure it out how to operate the tool. Just buying the tool is not enough; you must give people the opportunity to learn how to use it.

In the timekeeping story mentioned above, only some key personnel were trained how to use this new system. The company felt that it was too expensive to train all employees and therefore these selected personnel were supposed to train the others. Interestingly enough, the train-the-trainer group received 3 full days of training and the training they delivered to others was one hour of 'just-in-time training.' In addition, the tool company training did not address changes in the organization, so most of the folks having to use the tool were clueless when they had to actually enter their time and save or change their entries. The resolution to this issue was to have the employees enter their time in two systems until these troubles were resolved. This wasn't a good start for a tool that was supposed to be helping.

Not only do you need to provide training to the tool users, but you also need to provide time to work with the tool and time to attend the training. If purchasing the tool is a big priority, then figuring out how to use the tool must be as well. A former colleague, who works for a product company, arrived at the client site to train the customer on how to use their newly purchased tool. When he told me this story I was impressed that his client company understood the importance of training. However, he then relayed the following two items:

- “I’m not sure why you’re here this week; we really don’t have time for this now,” said one of the product managers attending the training.
- “I know we reserved this conference room for training, but you guys need to find another room because I want this room for other stuff today,” stated another manager who was also supposed to attend the training.

Someone with access to the purse strings partially understood the importance of training, in that they arranged for some training on the new tool, but they did not communicate this to those who were expected to use the tool. If the new tool was important enough to purchase, then it should be important enough to make time for everyone to learn to use it. There was also a gap in communicating the importance of the training. They wasted money on training for people who were not interested.

Another instructor arrived to teach a three-day training course only to hear:

- “Nobody sent out the training notice so the participants are offsite working with customers.”

Yes, this happened more than once. Communication is a good thing.

Here’s one last story if you are still considering asking your users’ to just figure it out. We met one team that did not even know enough about their tool to know that there were logs and reports within the tool that listed changes to the data stored in the tool. When we

mentioned the existence of these reports and the ability to manage these logs and reports to them, they were totally surprised. These reports and logs were being done painstakingly manually each month! We’re just saying – training, training, and more training: an upfront cost for a HUGE gain.

4. Know your company’s culture and how things work

Like we mentioned above, when you announce that you are buying a tool – and you should let everyone know that you are buying a tool – there will be concerns. Different corporate cultures will process and deal with change differently. If your organization is top-down, do what your boss says, there will be a lot of yes-sir and yes-mam. The group will adopt the tool and grumble later. “Just tell me what to do,” they will say. Some will argue that the users will have to learn to live with this change and stop complaining. What if the complaints, however, are really based on problems that can be resolved? Take the time to find out what is really going well and what is not going so well.

Implementing a new tool may not be the time for a ‘Just Do It’ attitude. A former colleague was discussing with his client what data to port from their existing system. The team concluded that the best approach was to port only open records for future releases. They decided to leave all the old (and closed) records in the existing system realizing that if they ever needed them they could still access the data and, if necessary, port this data at a later date – there were no license issues and no need to port all the data now. As he was packing up one of the team leaders came back with a look of disgust on her face. She informed him that she had just met with her manager and was told they needed to port everything – including history – from the old system. Being curious the former colleague asked why. She responded “‘because I said so’ was the only reason he gave.”

If your culture is less command-and-control, more about learning and knowledge, and has leaders who are

known for their competency, then the group will want as much information about the tool as possible. They will want to know about opportunities for additional training as well as the location of additional resources. If your group is team-based, they will figure things out collectively. The most important thing they will want to know is the high-level goal and together they will work toward this goal.

Here is another reason why it is good to know how your group operates. Without knowing the full effects of the changes they were making, a group of analysts got into the tool code and reporting functions of a new tool and changed a few things to make it easier for them to administer the functions. This was fine until they ran the monthly reports and found out that they had disabled most of the formatting and data integrity programs. It was not a pretty picture and because they had done it without the support of the tool company, they were on their own to "repair" the problems.

One last warning – a tool is not a replacement for human interaction. A tool is not going to fix the following story that a friend and colleague sent me. Two developers who are sitting next to each other would send e-mails back and forth to argue points rather than taking off their headphones turning and talking to the person next to them. My friend put this under the "Knowing how things *don't* work" category.

5. Know the limitations of your tool

A tool won't solve all of your problems. You do want to make sure that it will solve the primary reason for purchasing it. Once you determine this, understand what the tool will not do. Look at your users' expectations and determine if the tool will meet these expectations.

Another common situation is that the purchaser estimates the price of the tool without considering the cost of implementing and supporting the tool. Many tools today require seat licenses. The initial tool cost could be minor compared to the cost per seat that is

needed to make the tool available and usable by those that would need access in your company.

Finally, all tools don't play well in the sandbox. That is to say, tools don't easily communicate with each other and often require translation or interfacing. It is hard to predict what you may be doing in the future but it helps to figure out the environment that the tool will have to work in for the next five years, if possible. We said it before, plan and budget for how the tool will be used: try to recognize how this tool will be used and how it will work within your current environment and future environment.

If you consider these five things before you purchase a tool you are dramatically increasing the chances of the tool meeting your needs; of your organization, team, or group actually using the tool; and of you getting your money's worth. Investing in a tool can be a wise purchase as long as you plan this investment carefully.