



“Agency-Led Rollouts of Commercial off-the-Shelf (COTS) Integrated Tax Software”

Focus: Knowledge Transfer

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Presenters: Matthew Dyar and Angela Free
State of Alabama, Department of Revenue

Target: Agency-led COTS Rollouts



Replacing a Legacy System with a COTS System

Acquiring Developer Skills to Support the COTS System

Knowledge Transfer from Vendor to Agency Developers

Transitioning Lead Roles from Vendor to Agency Developers

Agency-Led Rollouts and Production Support

Target: Agency-led COTS Rollouts

The First Step



** Replacing a Legacy System with a COTS System*

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Laying the Groundwork for Successful Knowledge Transfer

□ Organizational Changes

■ Agency

- Old vs. New
 - Legacy (ARIS)
 - COTS (RITS)
- RITS Team Created
- Upper Management Support
- Seating Arrangements
- Implementation Coordinators (ICs)
- Transition from tax type process to functional areas

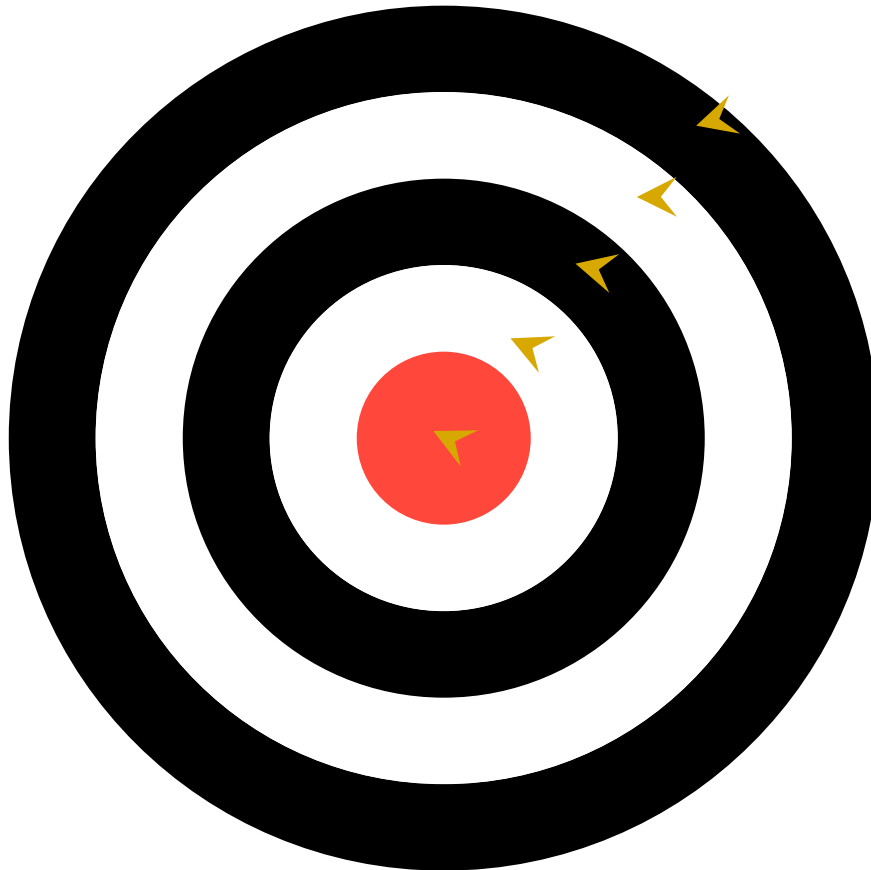
Laying the Groundwork for Successful Knowledge Transfer (cont.)

□ IT

- Developer selection and schedule
- Agency IT Staff / Vendor Team Leads
- Reorganization from tax type to functional area
- Support from upper-level IT Management

Target: Agency-led COTS Rollouts

The Second Step



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** Acquiring Developer Skills to Support the COTS System*

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Agency-Led Rollouts and Production Support

Acquiring New Developer Skills to support the COTS system

□ Technical Skills

- Programming Languages
 - Internal and External training (JIT)
- Trade Words / Jargon
- Proprietary Vendor Tools

□ Methodologies

- Gathering Requirements
- Tracking and Documenting Work Requests
- Documenting and Modifying code

□ Communication Skills

- Leading meetings and user demonstrations

Target: Agency-led COTS Rollouts

The Third Step



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Acquiring Developer Skills to Support the COTS System

** Knowledge Transfer from Vendor to Agency Developers*

Transitioning Lead Roles from Vendor to Agency Developers

Agency-Led Rollouts and Production Support

Knowledge Transfer

from Vendor to Agency Developers

- Agency developers work along-side vendors
 - Team-based seating arrangements
- Early involvement!
 - Developers
 - "Big picture"
 - Attend meetings and demos
 - Cross-training
 - Attend end-user training
 - Developers should "own" specific areas
 - Other IT Staff (Tech Team)
- Vendor training before each rollout of COTS software

Target: Agency-led COTS Rollouts

The Fourth Step



Replacing a Legacy System with a COTS System

Acquiring Developer Skills to Support the COTS System

Knowledge Transfer from Vendor to Agency Developers

**Transitioning Lead Roles from Vendor to Agency Developers*

Agency-Led Rollouts and Production Support



Transitioning Lead Roles from Vendor to Agency Developers

- Job Shadowing
- Early Involvement
 - As much responsibility/ownership as possible
 - Lead or co-lead a rollout or portions of a rollout
- Management Training (if needed)

Target: Agency-led COTS Rollouts

The Final Target



Replacing a Legacy System with a COTS System

Acquiring Developer Skills to Support the COTS System

Knowledge Transfer from Vendor to Agency Developers

Transitioning Lead Roles from Vendor to Agency Developers

** Agency-Led Rollouts and Production Support*



Agency-Led Rollouts and Production Support

- Your IT staff will be ready if:
 - The appropriate groundwork is in place
 - You have given them the support and training they need
 - They are involved early and often in various areas of the project
 - Developers feel a sense of ownership and pride for work on their areas of responsibility

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Questions?



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Agency-Led Rollouts and Production Support



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For additional questions, contact:

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