



Strategies for Success: Technology Adoption and Implementation

Kevin McCloughan, Ryan Companies
Jason Muhlstein, Wipfli LLP



*Please silence all cell phones.
This session is being recorded.*



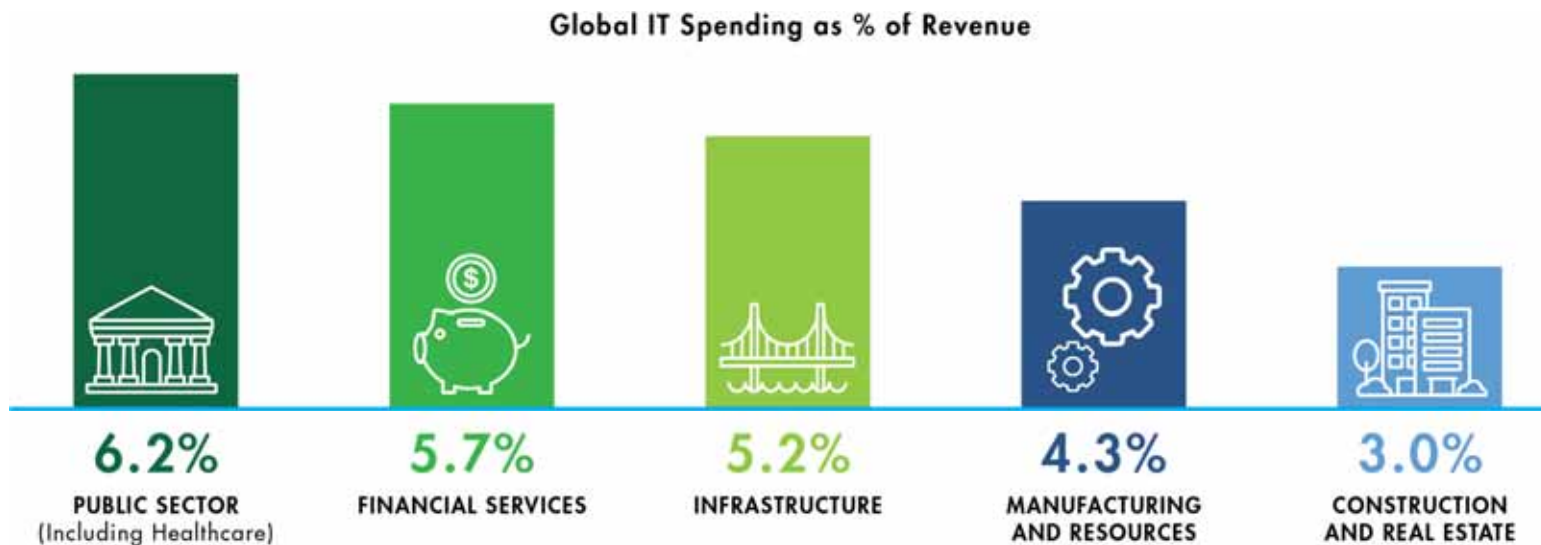
Kevin McCloughan
Chief Information Officer
Ryan Companies



Jason Muhlstein
Technology Consulting Partner
Wipfli LLP

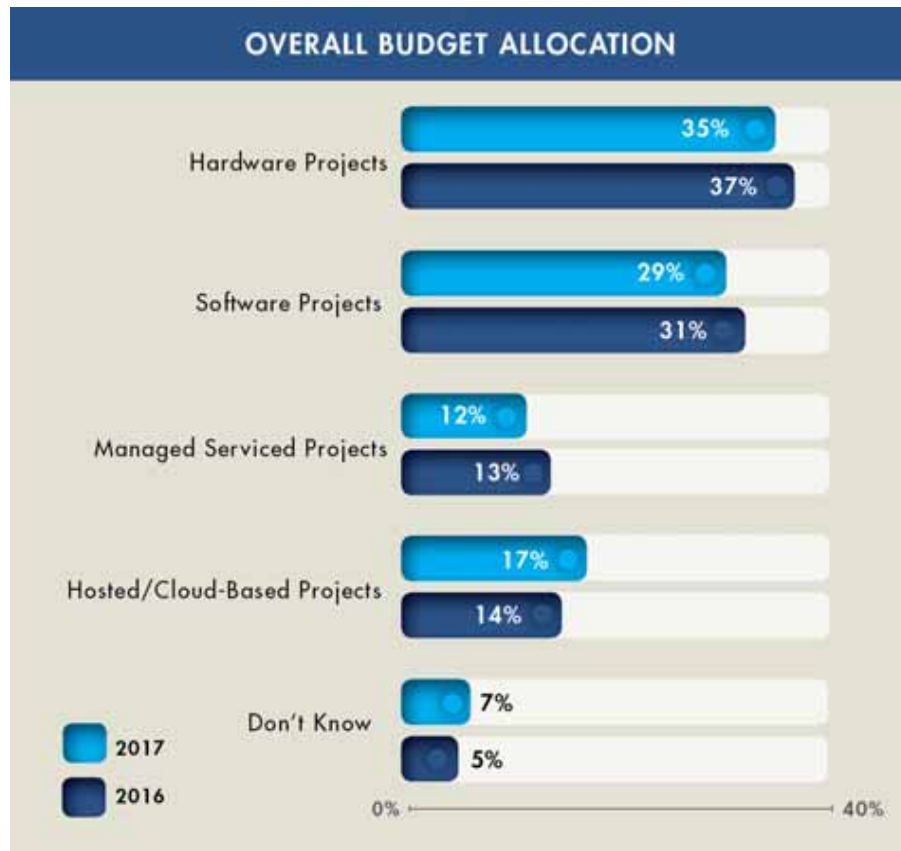
Be Ready to Leverage New Technologies

Spend: **1452%** increase in investment of CRE tech start-up companies from 2011 to 2016.



SOURCE: Service Innovation: Spending Metrics - IT Spending by Sector, IDC January 2015

Invest In Areas with the Future in Mind



Source: The Counselors of Real Estate: External Affairs Alert – June 2017 – The CRE® 2017-18 Top Ten Issues Affecting Real Estate
Source: CEB: Key Findings from the IT Budget Benchmark 2015-2016
Source: Spiceworks: State of IT

Key Areas of Focus

- Cloud Computing & Solutions
- Data Analytics
- Technology Integrations
- Internet of Things
- Cybersecurity

Success Is Work



*The people or the process typically accounts for issues with implementations and **not the technology itself.***



Source: PMI: Pulse of the Profession

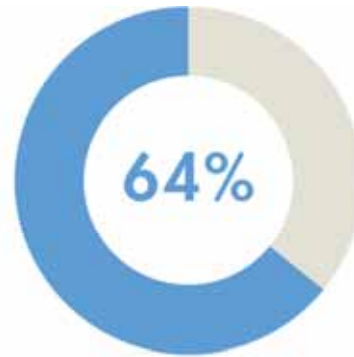


*Please silence all cell phones.
This session is being recorded.*

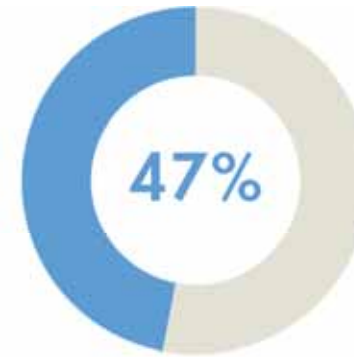
Define An IT Strategy



Feel that IT is investing
in areas that don't
support the business



Think that IT must
better understand
business goals

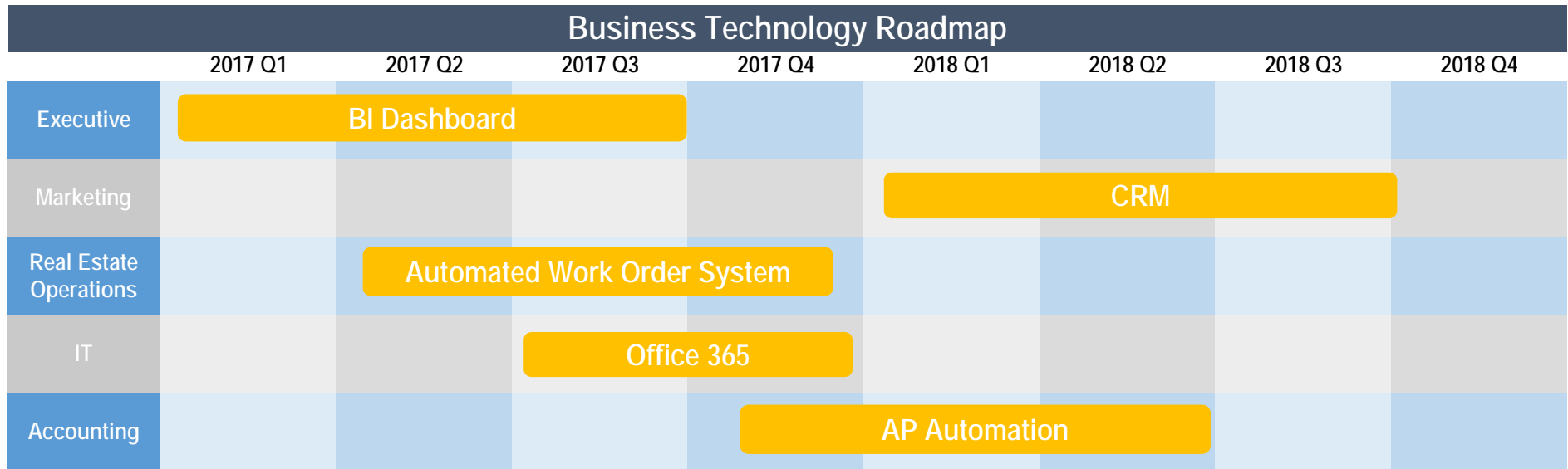


Believe that business
goals are going
unsupported by IT

Business stakeholders are 3.5 times more likely to be highly satisfied with IT if there is an effective IT strategy in place.

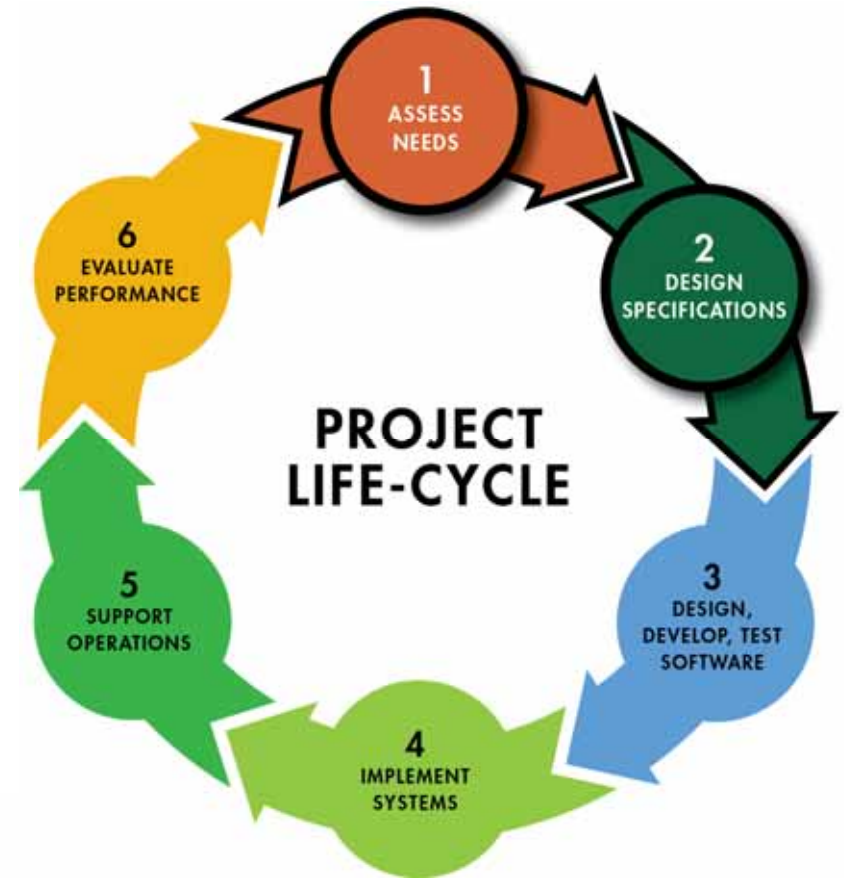
– Info Tech Research Group

Create and Manage a Roadmap



Begin With the End in Mind

- **Understand** and get agreement on the expected business benefits.
- **Define** your success measures during and after the project.
- **Align** functional needs and platform evaluations to how users do their jobs.



*Please silence all cell phones.
This session is being recorded.*

Identify and Staff Key Roles

Percentage of Projects that Met or Exceeded Objective Based on Sponsors Effectiveness



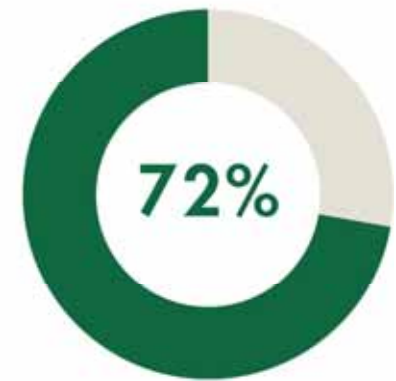
VERY INEFFECTIVE
Sponsors



INEFFECTIVE
Sponsors



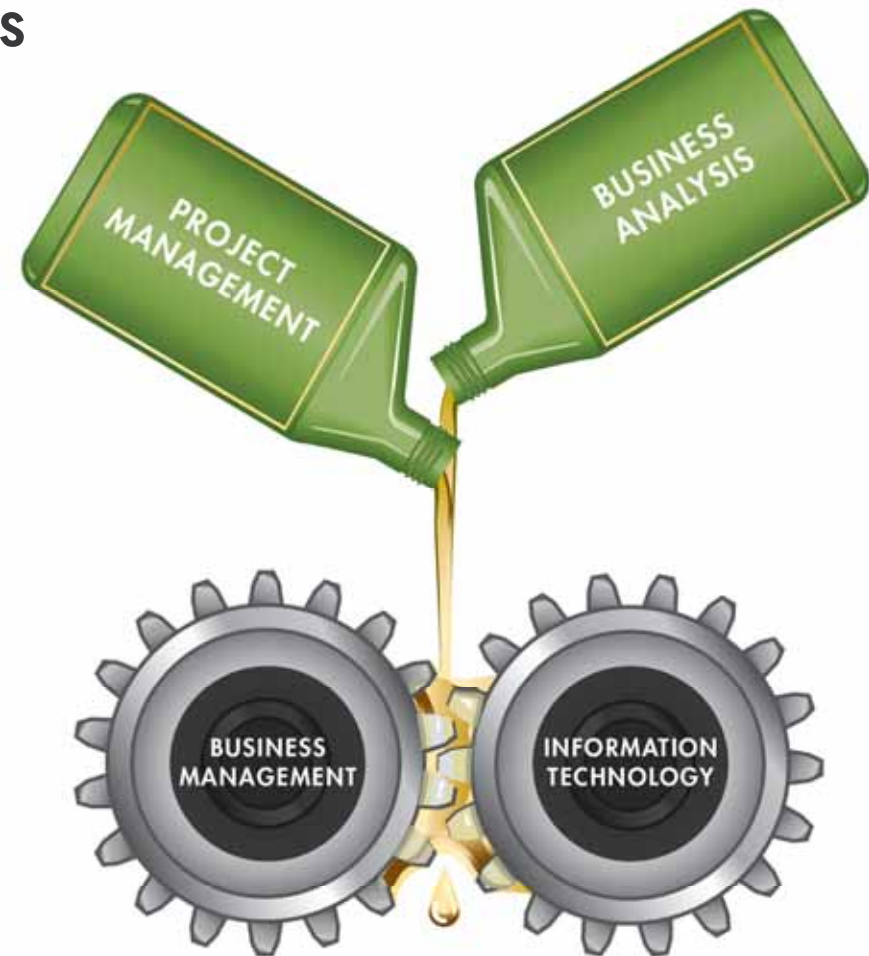
MODERATELY EFFECTIVE
Sponsors



EXTREMELY EFFECTIVE
Sponsors

Staff, Retain & Grow Project Managers

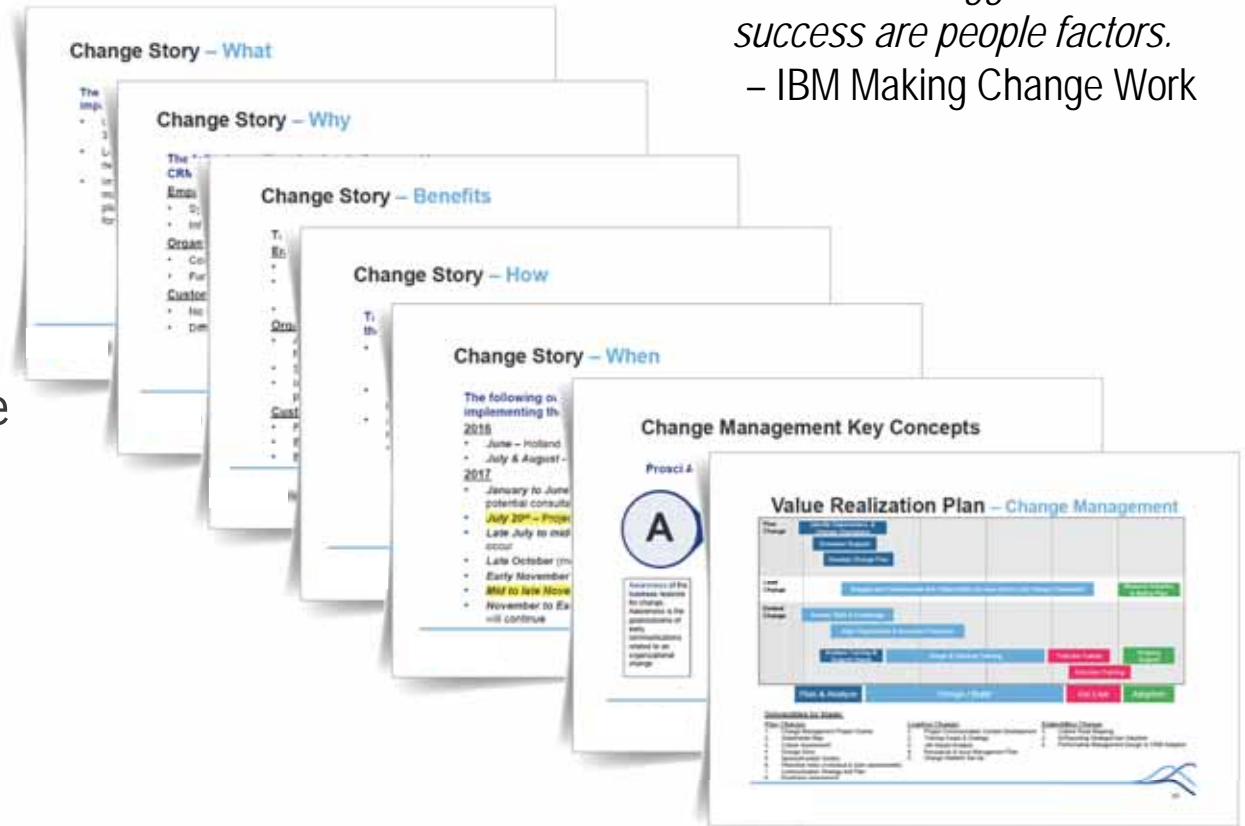
Project management and business analysis are the grease that enables the business and IT to produce systems aligned to business outcomes.



Inform & Empower Users

- **What** is changing?
- **Why** it needs to change?
- **How** will changes will be introduced?
- **When** will changes will be introduced?
- **What** action steps will move the change forward?

Only 40% of projects meet schedule, budget, and quality goals. Further, they found that the biggest barriers to success are people factors.
 – IBM Making Change Work



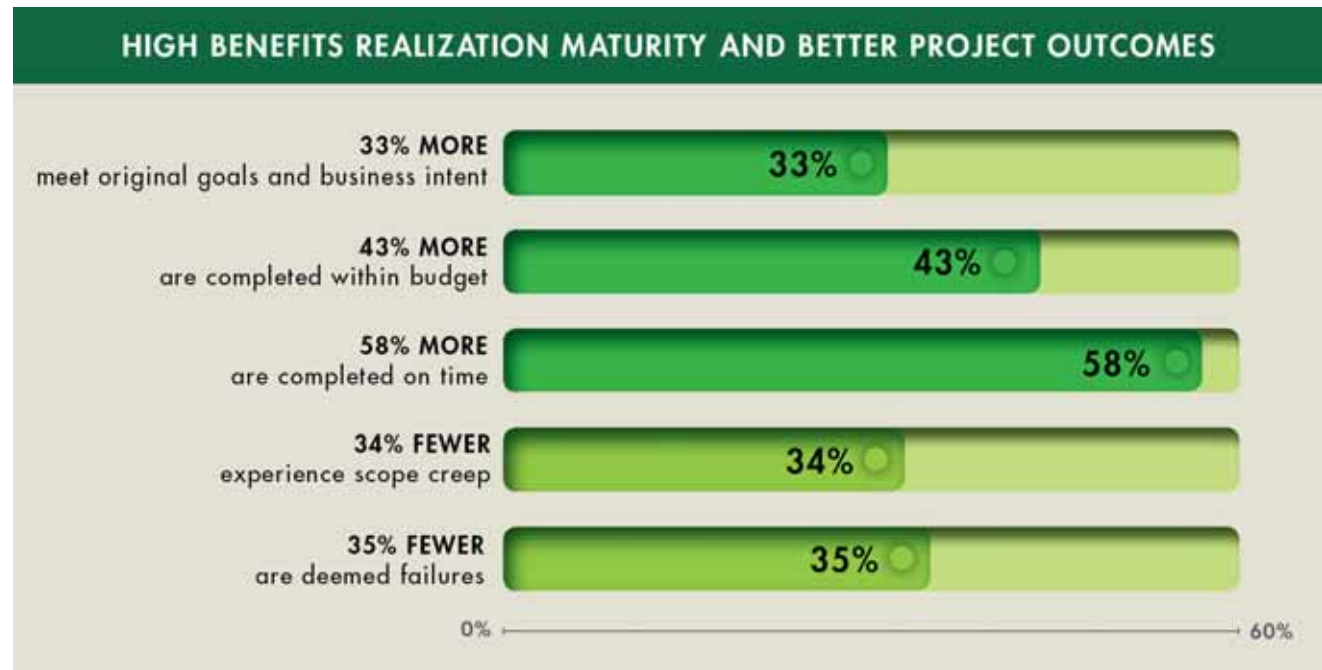
Have a Continuous Improvement Plan

- Clearly Defined Support Model
- User Communities
- Data Management
- Three Tier Support
- User Adoption Metrics
- Feedback Mechanisms
- On-going Training and Certifications



In Summary

- Develop IT Strategy and Roadmap
- Begin With the End in Mind
- Ensure You Have Sponsors, Project Managers, and Business Analysts
- Address User Change
- Continuously Improve



How to Get Started

1. Current Tech Project Inventory
2. Organize Business Leaders Discuss Needs and Priorities
3. Solicit Feedback From Current Users

| Project Portfolio Dashboard | | | | | | |
|-----------------------------|----------|---------|------------|-------|--------|-----------------|
| Delivery Roadmap | | | | | | |
| 2017 Q1 | 2017 Q2 | 2017 Q3 | 2017 Q4 | | | |
| BI Dashboard | | | | | | |
| | | | Office 365 | | | |
| Project Health Card | | | | | | |
| Project | Schedule | Budget | Resources | Risks | Issues | Wins/Objectives |
| BI Dashboard | | | | | | |
| Office 365 | | | | | | |

