

## Bromcom MIS implementation: best practice guide

### Introduction

This document outlines the key factors to consider when planning for and managing your Bromcom implementation. It is based on best practice in systems implementation and many years' experience implementing Bromcom in schools.

It covers:

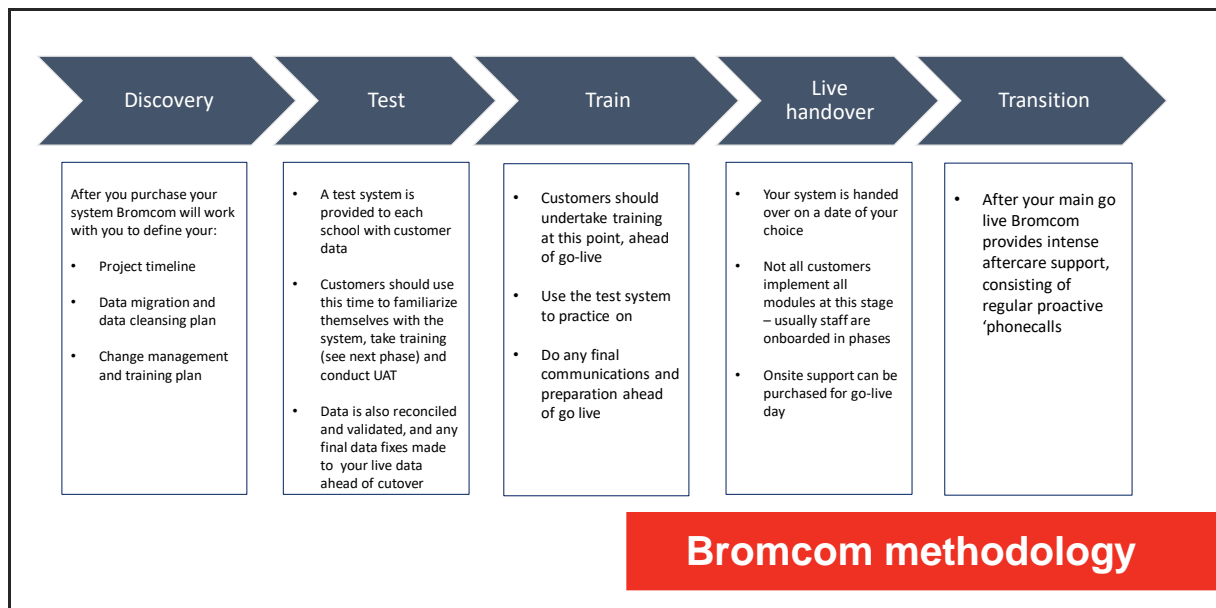
1. Project management and planning
2. Change management and training
3. Technical deployment, including data migration
4. Post go-live support
5. Full checklist for managing a Bromcom MIS implementation

In addition, we have a wide network of schools and MATs who have successfully made the transition to Bromcom and we are more than happy to provide you with contacts to discuss the best approach.

### 1. Project management and planning

Bromcom's implementation methodology is based on best practice and outlined in the diagram below. Your Bromcom deployment manager will talk you through this as part of your discovery.

#### *Bromcom implementation framework*



You will also be provided with a number of guides to read, starting with this one. Read all this guidance and follow the relevant recommended steps to help ensure that your implementation is a success.

### **Scope of go live and phased adoption**

It is best practice to stagger your Bromcom implementation to reduce risk and reduce the amount of training that staff need to do upfront. Bromcom comprises multiple modules and it is likely you don't need to use all of these from day one.

Create a roadmap for a phased implementation and from that determine a change management plan which includes staff training and communications at the right time (i.e. not too long before they go live with the module) and any other changes such as changes to school policies or procedures. Please see section two, 'change management and training.'

### **Cutover and go-live**

Bromcom will agree an initial go-live date with you that fits with your timelines. Ensure you read the dates in your Bromcom deployment plan and communicate the final cut-off date for using your current MIS to relevant stakeholders as early as possible, and agree what you will do with your current MIS and any redundant applications once Bromcom has been implemented to ensure people do not keep using these applications – for example, removing staff logins.

### **Project team**

Bromcom will appoint a deployment manager to manage the technical implementation and data migration. Schools should appoint an individual with the requisite skills and authority to handle the day-to-day implementation and also a senior sponsor to ensure the project is successful. Effective senior sponsorship is a critical success factor for any change project like this.

### **Project reporting, governance and controls**

Formulate a plan for how you will keep stakeholders informed about the project, focussing on the key milestones where they need to take action and attend training.

Decide how you will govern the project - this is usually through a project board chaired by the senior sponsor.



## 2. Change management and training

### Technical architecture, including interfaces.

Ensure you understand your current applications and data and how this will change when you move to Bromcom. Identify the interfaces between your MIS and your other systems and formulate a plan for replacing these (if needed) when you move to Bromcom. Replicating interfaces is usually straightforward and your supplier will do this for you, but you should make them aware of your go live date *well in advance*. Usually they will configure the interface on your live system once it has been handed over, but some will configure this on your test system for you to test.

Please refer to the [Bromcom website](#) for a list of applications we interface with already.

### Training

A comprehensive and high-quality training programme is the best way to unlock value from your new MIS. Agree who needs training early on in the implementation process and book your training sessions as early as possible to maximise attendance. Refer to the training guidance provided by your Bromcom deployment manager to understand which training is recommended for which roles.

Use the test system with your own data to practice running processes in the system - this a great way for staff to get familiar with the product. Refer to the Bromcom [Help Centre](#) for free training materials and videos for practice and to keep your learning relevant post go-live.

### Reports

Reporting is one of the most important functions of an MIS. Make a note of any reports that you rely on and want re-created in Bromcom and use your training sessions to learn how to create these. Not all will be needed for go-live so agree which are needed immediately and which can be created later on.

### Communication plan

Internal and external communication will be critical to minimise confusion during the project and ensure everyone knows what is happening and why (the benefits!). Agree who is responsible for this communication and how best to communicate.

Bromcom has a range of helpful videos and guides on our [Help Centre](#) for non-core users: teachers, parents and students.



### 3. Technical deployment, including data migration

#### Provisioning Bromcom – for your IT department

Bromcom is a web-based system accessible via any web browser and on any device.

You may need to make some minor changes to your IT policies to optimise system performance. Please read the internet explorer guidance and whitelisting guidance available on the [Help Centre](#) and make any necessary changes.

You'll also want to think about accessing Bromcom services used for the project - the training software we use and the sFTP for the test and live data transfer. Guides to both are available at the above link.

#### Data cleansing

Data quality is critically important when implementing a new system. To minimise the issues that arise at go live you should aim to cleanse all of the data that will be migrated across to Bromcom.

Agree who will be responsible for cleansing your data and create a data cleansing plan to finish ahead of providing the first data cut to Bromcom. Using the data migration scope document, prioritise which elements will be cleansed and by whom. Remember that once you have completed a test migration there is also likely to be remedial data cleansing work required, which Bromcom will make you aware of. Make sure that there are sufficient resources available to complete this additional data cleansing ahead of go-live.

#### Data migration

##### *Data Migration Scope*

Read the Data Migration Scope documents on the Help Centre and ensure you understand which data will be included in the migration and which will not.

Bromcom data migration is focussed on your main MIS and does not include any linked applications (most of which do not store data). Where additional data, information or documents do need to be migrated into Bromcom, you can often use Bromcom's import facilities outlined in your training sessions, or purchase additional data migration support. If you decide to import documents into Bromcom you may need third party software to do this, so please talk to your Bromcom deployment manager.

Decide what you will do with the data that is not included in the scope of data migration. Generally, archiving should be sufficient as any data you need to operate Bromcom will



already be included in the scope of the data migration. Create an archive plan that provides secure access to the residual data items for the period required.

#### *Data migration process and checking*

Bromcom will provide a secure facility for you to transfer your data, if we are migrating at the database level, or provide instructions on how we are retrieving the data via API. You should not email your data to Bromcom or anyone else.

Agree who will have responsibility for managing this process and the communications with Bromcom.

Once you have a test system it is your responsibility to check the data as part of your UAT process to ensure you're happy with it. You can report any issues to [migration@bromcom.com](mailto:migration@bromcom.com).

#### **User acceptance testing (UAT)**

Bromcom provides a test system for you to train and conduct UAT on. A UAT should involve key users running through the core processes and checking the test data. It is your responsibility to ensure that you are happy with the system ahead of going live.

#### **Security, including roles and permissions**

##### *Access management*

Agree your identity and access management policy – will you be implementing single sign on (SSO)? If so, decide when you will implement this and test it before deploying it to users. Read the [Single Sign on Quick Guide](#).

Remember that if you implement SSO in your test system as this will need to be replaced for your live system.

##### *Roles and permissions*

Understand the roles and permissions in the Bromcom MIS and agree who needs which role.

Bromcom will provide a single administrator login credentials to a nominated individual, who will then be responsible for provisioning your roles for the wider user base. As part of the migration all users are provisioned a basic (teacher)role.



#### **4. Post go-live**

##### **Helpdesk support**

Agree who will be responsible for raising calls with the Bromcom helpdesk and let Bromcom know by completing the contact form provided by your deployment manager [CustomerCareTeam@bromcom.com](mailto:CustomerCareTeam@bromcom.com).

Familiarise yourself with the Support Desk contact channels and opening times and communicate these to the relevant stakeholders.

##### **Transition Support**

Once live, you receive 1-2-1 support from a Customer Success Manager. This consists of regular phonecalls/email/onsite support that starts on day one of your go live and continues until you're happy and confident using the MIS. Make sure that you are happy with the time that the call is booked have arranged for the correct person to attend the first transition call.

##### **Additional training requirements**

If you are implementing Bromcom modules in phases remember to complete your extra training before you start using the additional modules. If you are not sure, discuss with your Customer Success Manager.

##### **System maintenance and releases**

Bromcom releases new enhancements, features and products regularly which provides customers with a range of benefits. However, this does require a shift in mindset for customers who are not used to this. To ensure that you maximise the benefits of these new features, agree who will be responsible for keeping abreast of the changes and communicating these to your users, and arranging any follow up training or guidance.

It is also best practice for a senior sponsor to maintain senior responsibility for the system and ensuring staff continue to realise the benefits of the system.

#### **5. Customer checklist for managing your Bromcom MIS implementation**

Aim to work through the below checklist which summarises the implementation advice outlined in this document.



**Table 1: implementation checklist**

Area	Function	Responsibility		Checklist for customers
		Brom-com	School/MAT	
<b>Overall project management and planning</b>	Project management		X	Have you read this guide and the other guidance referenced within it to understand the activity required?
	Adoption roadmap		X	Have you agreed when you will adopt each module in your school? Consider staggering implementation where possible
	Cutover and go live	X	X	Have you agreed an initial go-live date with Bromcom that fits with your school's workload and timetable? Are you happy with the plan that Bromcom has communicated in the deployment plan?
	Project team	X	X	Have you appointed a team – both a senior sponsor and an individual with the requisite skills and authority to handle the day-to-day implementation?
	Project reporting, governance and controls		X	Do you have a plan for governing the project with sufficient oversight of risks and issues, and a suitable escalation point internally?
<b>Change management and training</b>	Technical change management		X	Have you identified your current applications and data and how this will change when you move to Bromcom? Have you formulated a plan for replacing these when you move to Bromcom? Please refer to the Bromcom website for a list of applications we interface with - if yours is not included please discuss with your deployment manager
	Other changes		X	Do you understand which business <b>processes</b> are changing and any school policies or procedures that need to be updated?
	Custom reports		X	Have you noted the custom reports that you want re-created in Bromcom and



Area	Function	Responsibility		Checklist for customers
		Brom-com	School/MAT	
				agreed which are needed for go live? Have you agreed a plan for training your staff to recreate these reports?
	Training	X	X	<p>Have you identified who needs training and agreed how they will be trained?</p> <p>Have you booked your Bromcom-led training sessions to take place ahead of going live?</p> <p>Have you booked any “train the trainer sessions” for other staff?</p> <p>Have you visited and book marked the <a href="#">online help centre</a> for free training materials and videos?</p> <p>Have your staff practiced using the system ahead of go live, for example as part of UAT?</p>
	Communication Plan		X	Have you identified all affected parties and agreed who and how you will communicate the changes? Think about the different users – suppliers, teachers, parents, etc
<b>Technical deployment, incl. data migration</b>	Provision and configure environment	X	X	Have you read the key documents to optimise system performance? Please read the <a href="#">relevant setup guides</a>
	Data cleansing		X	Have you agreed who will be responsible for cleansing your data? Have you created a data cleansing plan to finish ahead of providing Bromcom with your first data cut; and then after your first test migration?
	Data migration	X	X	<p>Have you read and understood the Data Migration Scope documents and created an archive or migration plan for any data, information and documents that will not be migrated across to Bromcom?</p> <p>Have you agreed who will have responsibility for passing Bromcom your data and receiving the logins?</p>





Area	Function	Responsibility		Checklist for customers
		Brom-com	School/MAT	
				Do you have a data reconciliation and sign off plan?
	User acceptance testing (UAT)		X	Do you have a UAT plan which outlines the key processes you will run through when you receive your test and your live system?
	Security, including roles		X	What is your identity and access management policy – will you be implementing single sign on? Read the document: <a href="#">Single Sign on Quick Guide</a> Have you mapped out the roles your users need? Have you agreed who will allocate these?
	Interface testing		X	Do you have a plan for testing your replacement interfaces?
<b>Post implementation</b>	Setup and user provisioning		X	Have you created a checklist for setting up the system on day one? (Please note there is an in-built checklist included in the MIS, and transition support to help you once the system has been handed over)
	Transition support	X		Have you agreed who will attend the first transition call with your Customer Success Manager and let your deployment manager know?
	Ongoing Support	X		Have you agreed the person who will be responsible for raising calls with the Bromcom helpdesk? Have you passed these details onto your deployment manager via the shared checklist document? Have you familiarised yourself with the <a href="#">Support desk service levels</a> and opening times?
	System maintenance and releases	X	X	Have you identified who will be responsible for maintaining the system, including informing staff about releases? Have you agreed who will be the senior



		Responsibility		Checklist for customers
Area	Function	Brom-com	School/MAT	
				person at your school responsible for the system performance?

